Unified Messaging Configuration Guide

BCM450 1.0
Business Communications Manager

Document Status: **Standard**
Document Number: **NN40160-504**
Document Version: **01.01**
Date: **August 2008**

NORTEL

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Chapter 1
Getting started

About this guide

The *Unified Messaging Configuration Guide* describes how to install, configure, and troubleshoot Unified Messaging on a Business Communications Manager (BCM) system and on subscribers' computers.

You can install CallPilot Unified Messaging on subscribers' computers, or subscribers can perform some configuration and troubleshooting tasks under your guidance.

About CallPilot Unified Messaging

CallPilot Unified Messaging is a multimedia messaging application. Unified Messaging works with e-mail clients to provide a single graphical interface for e-mail messages and CallPilot voice, fax, and text messages.

You can also start an Instant Messaging (IM) session from a CallPilot or e-mail message through Microsoft Windows / MSN Messenger or a Nortel Multimedia PC Client (MCS 5100).

The maximum number of Unified Messaging clients supported on the Business Communications Manager is 300.

Hardware requirements

The following list contains both the minimum and recommended hardware that Unified Messaging software needs for operation.

- IBM PC or compatible:
  - minimum Pentium/586 or faster system with 16 megabytes (MB) of RAM minimum; 32 MB recommended
- Monitor:
  - 16-color VGA 640 x 480 capability minimum; 256-color SVGA 800 x 600 capability recommended
- Disk drive space:
  - To install Unified Messaging, subscribers need 110 MB of disk space. After the installation is complete, the temporary files are automatically deleted to recover 55 MB of disk space. You or the subscriber must manually delete the CallPilotDesktopMessaging.exe file to recover the additional 55 MB. The.exe file is located where you downloaded it.
- CD-ROM drive
- Windows-compatible mouse and keyboard

- LAN connection to Business Communications Manager. Subscribers can access their CallPilot messages over the LAN through ISDN, ADSL, dial-up modem or Ethernet.

Note: When it is installed, Unified Messaging takes up 25MB of space on the subscriber's hard disk.

Optional hardware

- a sound card and a set of speakers for playing messages on a computer
- a microphone for recording messages on a computer

Software requirements

Windows operating systems

You can use Unified Messaging with:

- Windows 2000 Professional
- Windows XP Professional
- Windows Vista Business, Ultimate, and Enterprise- both 32-bit and 64-bit versions are supported

Unified Messaging also supports the following Thin Clients:

- Citrix Metaframe Presentation Server 4.0 on Windows 2003 Server (All Editions)
- Citrix Metaframe XP on Windows 2000 Server (All Editions) and Windows 2003 Server
- Citrix Metaframe Presentation Server 3.0 on Windows 2003 Server

Supported Integrated clients

Integrated clients, also called *groupware*, is software designed for group collaboration. Integrated clients run with a corporate e-mail server. Unified Messaging for integrated clients provides access to commands and Unified Messaging Help directly from the client. During installation, Unified Messaging customizes integrated clients to make messaging tasks simpler and more efficient. Unified Messaging automatically performs most or all of the groupware configuration during installation.

You can use Unified Messaging with one or more of these clients:

- Microsoft Outlook 2007
- Microsoft Outlook 2003
- Microsoft Outlook 2002/XP
- Microsoft Outlook 2000
- Novell GroupWise 6.5, 7.0 and 7.0.1
- Lotus Notes 6.0, 6.5, and 7.0

CallPilot Desktop Messaging 4.0 does not support Groupwise 7.x on Microsoft Vista operating systems.

Supported Internet mail clients

Internet mail clients are also called *IMAP clients.* It is an e-mail client that enables you to manage CallPilot messages from a folder in the e-mail client using the IMAP protocol. You must manually configure the Internet mail client with the settings required to connect to your system.

You can use Unified Messaging with these IMAP Internet clients:

- Microsoft Outlook Express 6.0
- Microsoft Outlook 2000, 2002 (XP), 2003, and 2007 in Internet mail mode

Format for voice messages

Business Communications Manager uses the G711 format to record and store voice messages. CallPilot 150 uses G723.1. Since the Unified Messaging player records and plays messages in WAV format, Business Communications Manager or CallPilot messages must be converted to WAV before playing, and composed messages must be converted to G711 or G723.1 to be stored on Business Communications Manager or CallPilot 150. This decoding and encoding is done on the desktop client.

Audience

This guide is for system administrators who configure and maintain CallPilot and Unified Messaging on a BCM system.

Acronyms

The following is a list of acronyms used in this guide.

Table 1

Acronym	Description
BCM	Business Communications Manager
CLID	Calling Line Identification
DN	Directory Number
DNS	Domain Name System
IMAP	Internet Message Access Protocol
ISDN	Integrated Services Digital Network
LAN	Local Area Network
LDAP	Lightweight Directory Access Protocol

Table 1

Acronym	Description
SMTP	Simple Mail Transfer Protocol
VPIM	Voice Profile for Internet Mail

Symbols and text conventions

These symbols are used to Highlight critical information for the BCM system:

Caution: Alerts you to conditions where you can damage the equipment.

Danger: Alerts you to conditions where you can get an electrical shock.

Warning: Alerts you to conditions where you can cause the system to fail or work improperly.

Note: A Note alerts you to important information.

Tip: Alerts you to additional information that can help you perform a task.

Security note: Indicates a point of system security where a default should be changed, or where the administrator needs to make a decision about the level of security required for the system.

Warning: Alerts you to ground yourself with an antistatic grounding strap before performing the maintenance procedure.

Warning: Alerts you to remove the BCM main unit and expansion unit power cords from the ac outlet before performing any maintenance procedure.

These conventions and symbols are used to represent the Business Series Terminal display and dialpad.

Convention	Example	Used for
Word in a special font (shown in the top line of the display)	Pswd:	Command line prompts on display telephones.
Underlined word in capital letters (shown in the bottom line of a two line display telephone)	PLAY	Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons	#	Buttons you press on the dialpad to select a particular option.

These text conventions are used in this guide to indicate the information described.

Convention	Description
bold Courier text	Indicates command names and options and text that you need to enter. Example: Use the **info** command. Example: Enter **show ip** {**alerts**|**routes**}.
italic text	Indicates book titles
plain Courier text	Indicates command syntax and system output (for example, prompts and system messages). Example: `Set Trap Monitor Filters`
FEATURE HOLD RELEASE	Indicates that you press the button with the coordinating icon on whichever set you are using.

Related publications

This section provides a list of additional documents referred to in this guide.

Keycode Installation Guide (NN40010-301)

CallPilot Manager Set Up and Operation Guide (NN40160-304)

CallPilot 4.0 Unified Messaging User Guide for Internet Clients (NN40090-108)

CallPilot 4.0 Unified Messaging User Guide for Lotus Notes (NN40090-109)

CallPilot 4.0 Unified Messaging User Guide for Microsoft Outlook (NN40090-110)

CallPilot 4.0 Unified Messaging User Guide for Novell GroupWise (NN40090-111)

How to get Help

This section explains how to get help for Nortel products and services.

Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

http://www.nortel.com/support

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting Help over the phone from a Nortel Solutions Center

If you don't find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

http://www.nortel.com/callus

Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

http://www.nortel.com/erc

Getting Help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

Chapter 2
Configuring your system for Unified Messaging

Before you install Unified Messaging

Before using Unified Messaging:

- In Element Manager, enable the Unified Messaging keycode and the (optional) Fax keycode. For information on enabling software keycodes, refer to the *Keycode Installation Guide.*
- In CallPilot Manager, ensure that the number of maximum outcalling channels is enough to accommodate the expected CallPilot telephone player usage. This value governs the number of simultaneous channels used for outcalling. For information on setting the outcalling channels, refer to the *CallPilot Manager Set Up and Operation Guide*.

Unified Messaging and data network security

Due to the complexity and diversity of network configurations, this guide does not cover data network security issues. Discuss security issues with a security specialist or data network administrator.

Configuring IMAP/LDAP/SMTP servers for Unified Messaging

CallPilot supports IMAP/LDAP protocols, which let Unified Messaging subscribers access their CallPilot mailboxes using Microsoft Outlook, Lotus Notes, Novell GroupWise, and selected third-party Internet mail clients: Microsoft Outlook Express, Microsoft Outlook, Netscape Messenger, and Qualcomm Eudora Pro.

Each type of desktop client is configured and used slightly differently. To configure a specific desktop client, refer to "Installing and configuring Unified Messaging" on page 17.

Although you individually configure each desktop client you use for Unified Messaging, you configure Business Communications Manager the same way for all the desktop clients it supports. Follow the instructions in this chapter to configure the IMAP/LDAP/ SMTP servers.

IMAP

Internet Message Access Protocol (IMAP) lets a client access and use electronic mail messages on a server. These messages are always stored on Business Communications Manager.

IMAP lets subscribers check for messages from any location with an Internet connection. IMAP also lets subscribers access messages from multiple locations. IMAP is a method of accessing electronic mail or bulletin board messages that are kept on a shared mail server. IMAP lets a client e-mail program access remote message stores as if they were local. For example, e-mail stored on an IMAP server can be accessed from a computer at home, a workstation at the office, and a notebook computer while traveling, without the need to transfer messages or files between these computers.

LDAP

Lightweight Directory Access Protocol (LDAP) is a set of protocols for accessing information directories. LDAP supports TCP/IP, which is necessary for any type of Internet access. LDAP lets a client search for and use information entries on a directory server, such as the Business Communications Manager. For example, a typical entry in the CallPilot directory contains attributes of a subscriber such as name, telephone number, and CallPilot mail address. Internet clients can use LDAP to query address book information from the CallPilot directory, perform address resolution, or search for specific subscribers (if this functionality is implemented by the Internet client).

Note: Unified Messaging clients require LDAP authentication of the CallPilot mailbox directory number and password to begin a search on a Business Communications Manager LDAP directory.

SMTP

Simple Mail Transfer Protocol (SMTP) is a protocol for sending e-mail messages between servers. Most e-mail systems that send mail over the Internet use SMTP to send messages from one server to another. These messages can then be retrieved with an e-mail client using IMAP. SMTP is also generally used to send messages from a mail client to a mail server. This is why you must specify both the IMAP server and the SMTP server when you configure your e-mail application.

Since Voice Profile for Internet Mail (VPIM) Networking also uses SMTP, you do much of the configuration for IMAP in the same places you set up VPIM Networking.

Configuring environments without a DNS

The Domain Name System (DNS) is an Internet service that translates domain names into IP addresses. Because domain names are alphabetic, they are easier for subscribers to remember. The Internet is based on IP addresses. Every time you use a domain name, therefore, a DNS must translate the name into the corresponding IP address. For example, the domain name www.example.com can translate to 198.105.232.4.

If one DNS server does not know how to translate a particular domain name, it asks another one, and so on, until the correct IP address is returned.

Unified Messaging uses Domain Name resolution, which is provided by a DNS. If your network does not have a DNS, then you must configure Unified Messaging to use IP addresses.

For Internet Mail clients, the format for addressing a message is <SMTP/VPIM prefix><Mailbox number>@<BCM HOST name>.localdomain.

Configuring Unified Messaging with IP address only

If you do not use DNS to resolve domain names, configure the Business Communications Manager system and client computers to use an IP address only:

1. Ensure the Business Communications Manager is not configured to use DNS.
2. Ensure that Business Communications Manager is configured with a host name. If it is not, enter the host name on the Business Communications Manager system.
3. Configure computers running Unified Messaging with the IP address of the Business Communications Manager system.

To check that Business Communications Manager is not configured to use DNS

Note: Before you check that the Business Communications Manager is not configured to use DNS, ensure the Business Communications Manager is using a static IP address and DHCP is disabled.

1. Start Element Manager.
2. On the Configuration tab, choose the **Data Services** folder.
   The system tasks appear.
3. Choose the **DNS** task.
   The Domain Name Service tab appears.
4. Ensure the **Enable DNS** box is not selected.
5. Ensure the **Primary (& Sec.) Server IP Addr** field is empty. If it is not, delete any entries.

To check that a Host Name is entered on the BCM

1. Start Element Manager.
2. On the Configuration tab, choose the **System** folder.
   The system tasks appear.
3. Choose the **Identification** task.
   The System Identification tab appears.
4. Enter a system name in the **System Name** box, if one is not entered.
   A system name can be any name (for example, myCompany).

To configure access to the BCM on a subscriber computer

On each subscriber computer:

1. Start Unified Messaging for the first time on the client computer.
   The Unified Messaging Logon page appears.
2. In the **Server** box, type the IP address.
3. In the **Password** and **Mailbox** boxes, enter the subscriber's password and mailbox number.
   The e-mail client opens.

Chapter 3
Installing and configuring Unified Messaging

It takes approximately 10 minutes to install Unified Messaging. Depending on the subscribers' expertise, you can ask them to install Unified Messaging on their computer.

For information about Microsoft Outlook, Novell GroupWise, Lotus Notes, and Internet Clients to address, compose, open, delete, and perform other CallPilot unified messaging operations, see:

- *CallPilot 4.0 Desktop Messaging User Guide for Microsoft Outlook*
- *CallPilot 4.0 Desktop Messaging User Guide for Novell Groupwise*
- *CallPilot 4.0 Desktop Messaging User Guide for Lotus Notes*
- *CallPilot 4.0 Desktop Messaging User Guide for Internet Clients*

Installation information

Before you install Unified Messaging on a subscriber's computer:

- Make sure the subscriber's computer has the correct hardware and software requirements. Refer to "Hardware requirements" on page 7 and "Software requirements" on page 8.

- If the subscriber has any version of Unified Messaging other than 4.0, you must uninstall the earlier version before you do the installation procedure. Refer to "Uninstalling an earlier version of Unified Messaging" on page 19.

- Ensure that the microphones, speakers, and sound cards that are connected to the subscriber's computer are configured. Refer to the manufacturer's documentation.

- If the subscriber is going to install Unified Messaging and wants to install the Fax Printer Driver, the subscriber must have the right to impersonate a client after authentication. Refer to the online Microsoft Knowledge Base article Q821546 for more information.

- Have this information available:
  - — the fully qualified domain name (FQDN) of the Business Communications Manager system, or the IP address, if you do not have a DNS
  - — the SMTP/VPIM prefix of the Business Communications Manager. If you use Message Networking, include this prefix

— the subscriber's mailbox number

Note: If the subscriber uses Novell GroupWise, the subscriber must have Windows Messaging 4.0 installed on their computer. Windows Messaging is usually installed when Windows is installed on a computer. However, if Windows Messaging 4.0 is not installed, the GroupWise installation gives you these options:

- Install the complete Windows Messaging system.
- Leave Windows Messaging as is.

Install the Complete Windows Messaging system even if Windows Messaging is already installed. This ensures that the GroupWise option is available during Unified Messaging installation.

Fax feature requirements

Fax features for Unified Messaging:

- Fax Mail Merge
- Custom Fax Cover Sheets
- Integrated Fax Messaging Controls

The CallPilot Fax Mail Merge feature allows you to customize and send fax messages to multiple recipients using Microsoft Word's Mail Merge utility.

When you use the Fax Mail Merge feature, you do not receive a delivery receipt to confirm the recipients received the fax.

You do receive a failure notification, if any or all of the recipients do not receive the fax.

Note: You must select the **Install Fax batch driver for mail merge** option during the installation of Unified Messaging to use the Fax Mail Merge feature.

The Custom Fax Cover Sheets allow you to customize your fax cover sheets from the CallPilot desktop client. You can use any digital image as the basis for the cover sheet and customize it for each fax by providing sender information and a cover sheet memo. This information is automatically merged with your cover sheet image when you fax the document.

Note: You can download the Custom Fax Cover Sheets from the Administrator Applications Unified Messaging page on the Business Communications Manager web page.

Integrated Fax Messaging Controls allow you to create CallPilot messages, attach documents, and view, annotate, and modify fax documents through the CallPilot custom form. This feature is available only to the Windows Groupware clients: Microsoft Outlook, Lotus Notes, and Novell GroupWise.

Uninstalling an earlier version of Unified Messaging

If the subscriber has any version of Unified Messaging older than 2.5 on their computer, uninstall it before you do the installation procedure.

To uninstall Unified Messaging

1. Quit any open applications, including the CallPilot installation program.
   If you use Microsoft Outlook, it can take an additional minute or two for the mail services to shut down.
2. Click the Windows **Start** button.
3. Click **Control panel**.
   The **Control Panel** window opens.

4 Click **Add/Remove Programs** icon.
The Add/Remove Programs properties dialog box appears.

5 In the list, select **Nortel Unified Messaging** and click the **Remove** button.
The dialog window opens to confirm the deletion.

6 Click **OK**.

Installing Unified Messaging

You install Unified Messaging from the Business Communications Manager web page.

To install Unified Messaging

1 Exit any Windows programs that are running.

2 Start a browser session and connect to the Business Communications Manager web page.
The Business Communications Manager Login dialog box appears.

3 Enter your user name and password and click the **OK** button.
The **Welcome to Business Communications Manager** page appears.

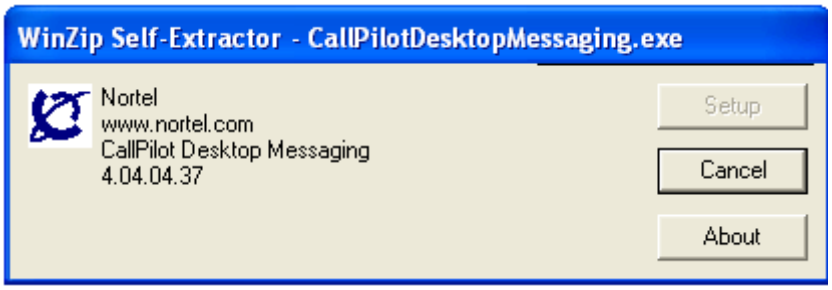
4 Click the **User Applications** link.
The **User Applications** page appears.

5 Click the **CallPilot Unified Messaging** link.
The CallPilot Unified Messaging download page appears. There are two Download CallpIlot Unified Messaging links. One link supports English, French, simplified Chinese, and Dutch. The other link supports Italian, Japanese, Spanish, and German.
You can also install the Custom Fax Cover Sheets from this page if you have enabled the fax capabilities on your Business Communications Manager.

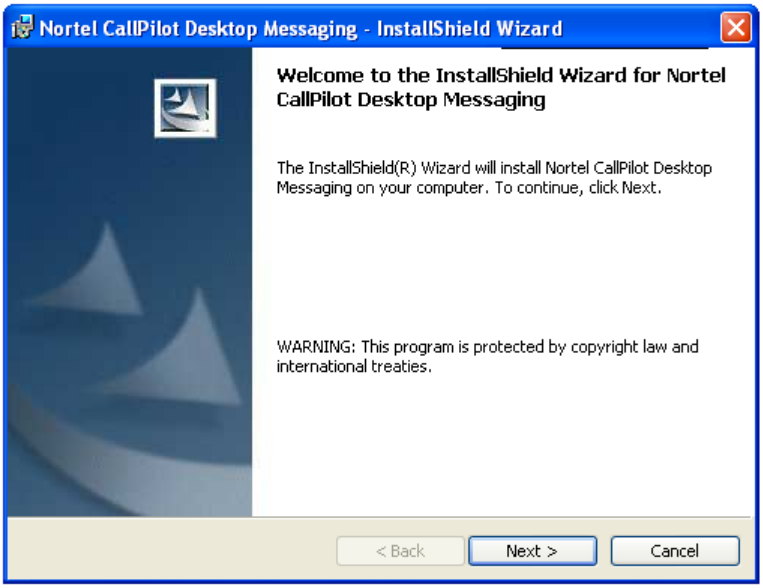
6 Click the **Download CallPilot Unified Messaging** link that supports your language.
The File Download dialog box appears.

7 Click the **Save** button and save the application to where you want to install it.

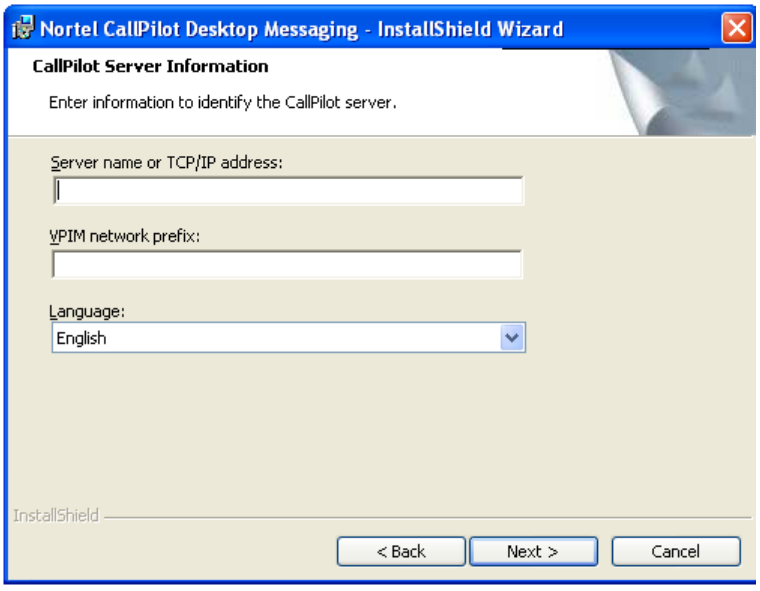
8 After the application downloads, double-click it to launch the installation, and follow the instructions in the installation wizard.



9 The setup program starts and the Welcome window appears.


Nortel CallPilot Desktop Messaging - InstallShield Wizard
Welcome to the InstallShield Wizard for Nortel CallPilot Desktop Messaging
The InstallShield(R) Wizard will install Nortel CallPilot Desktop Messaging on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

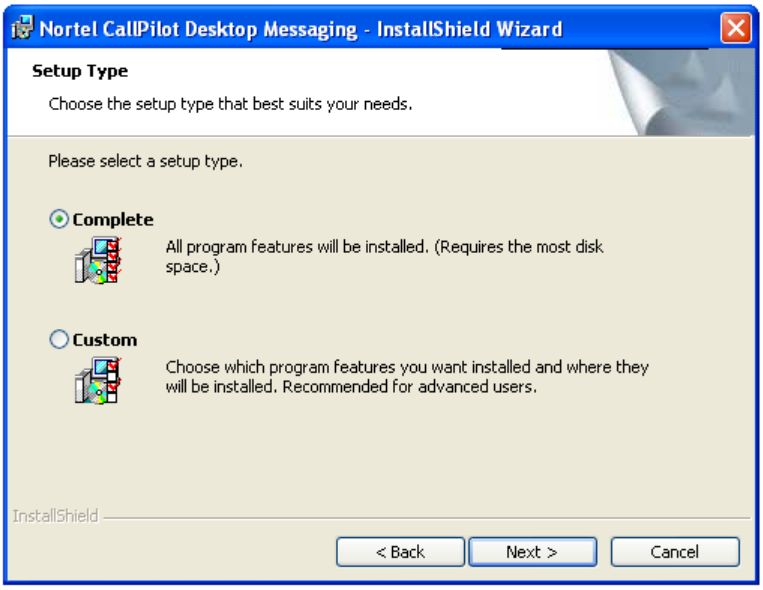
10 Click the **Next** button.
The **CallPilot Server Information** window appears.



11 In the **Server name or TCP/IP address** box, type the FQDN or IP address of the Business Communications Manager system.

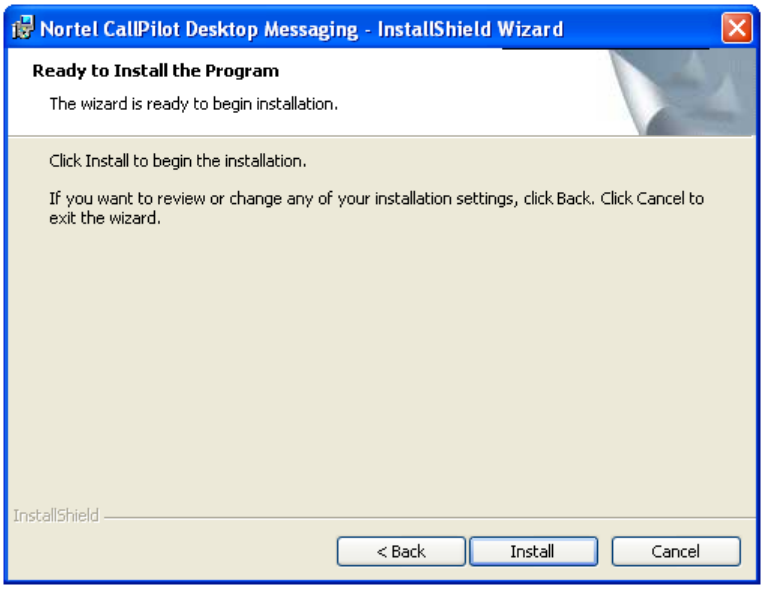
12 In the **VPIM network prefix** box, type the VPIM prefix of the CallPilot subscriber's address. If CallPilot Networking is not enabled on the Business Communications Manager system, leave this box blank, otherwise use the value defined in the Local Prefix field in the Digital Networking Properties page in CallPilot Manager.

13 In the Language box, select the language you want to use and click **Next**.
The **Setup Type** window appears.


Nortel CallPilot Desktop Messaging - InstallShield Wizard
Setup Type
Choose the setup type that best suits your needs.
Please select a setup type.
Complete
All program features will be installed. (Requires the most disk space.)
Custom
Choose which program features you want installed and where they will be installed. Recommended for advanced users.
InstallShield
< Back
Next >
Cancel

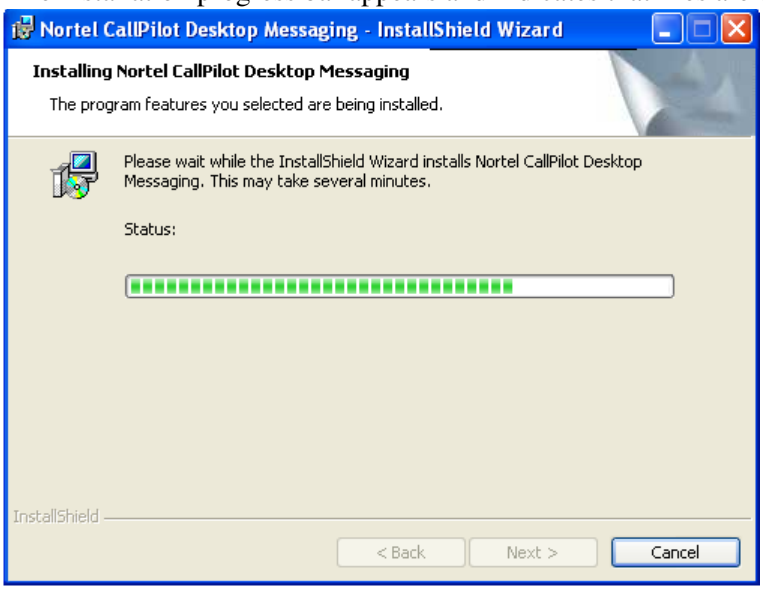
14 Select **Complete** or **Custom**.
If you select Complete, the installer automatically installs CallPilot Desktop Messaging for all email clients found on the computer with the following exception. If Microsoft Outlook and Novell GroupWise are installed on the same computer, the Novell GroupWise desktop client is installed and the Microsoft Outlook desktop client is not. CallPilot Desktop Messaging does not support Microsoft Outlook and Novell GroupWise on the same computer.
If you select Custom, you may choose which features to install. Only features valid for the computer will display.

15 Click **Next**.
The Ready to Install the Program windows appears.

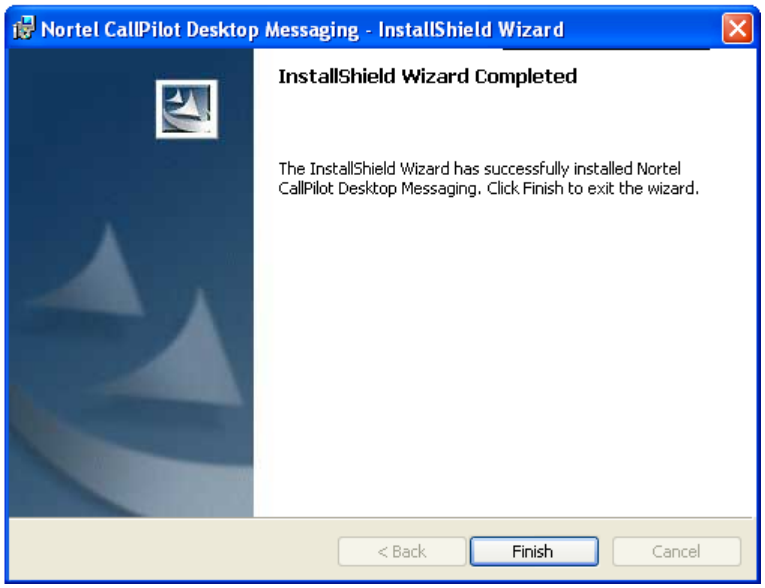

Nortel CallPilot Desktop Messaging - InstallShield Wizard
Ready to Install the Program
The wizard is ready to begin installation.
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield
< Back
Install
Cancel

16 Click **Install**.

17 The installation progress bar appears and indicates that files are being copied.


Nortel CallPilot Desktop Messaging - InstallShield Wizard
Installing Nortel CallPilot Desktop Messaging
The program features you selected are being installed.
Please wait while the InstallShield Wizard installs Nortel CallPilot Desktop Messaging. This may take several minutes.
Status:
InstallShield
< Back
Next >
Cancel

18 Click the **Finish** button to complete the installation.


Nortel CallPilot Desktop Messaging - InstallShield Wizard
InstallShield Wizard Completed
The InstallShield Wizard has successfully installed Nortel CallPilot Desktop Messaging. Click Finish to exit the wizard.
< Back
Finish
Cancel

Setting the default e-mail client

After you install Unified Messaging, you must set the default e-mail client.

To set the default e-mail client

1. Click the Windows **Start** button, point to **Settings** and click **Control Panel**.
   The **Control Panel** window appears.
2. Double click the **Internet Options** icon.
   The **Internet Properties** window appears.
3. Click the **Programs** tab.
4. In the **E-mail** list box, make sure the client that is displayed is the e-mail client you are using. If another e-mail client is displayed, select the correct e-mail client from the **E-mail** list box, click the **Apply** button and click the **OK** button.

Configuring forwarding or replying mail delivery settings

To ensure you can forward or reply to Unified Messaging messages, you must check one of the default settings for mail delivery.

1. In your Inbox, click **CallPilot Desktop Messaging**.
2. Click **CallPilot Configuration**.
3. Click the **Mail** tab to display the current mail settings.
4. Check to see if the **Include a message header when forwarding/replying** check box is not selected. If you have a fax keycode enabled you can select this check box. If you do not have a fax keycode enabled do not select this check box.

Note: If the check box is selected and you have a fax keycode enabled, the header information of the original message appears in a reply or forwarded message. The message becomes a fax message because the headers are attached as a text message.

Do not select the **Include a message header when forwarding/replying** check box or add text to the message, although the **New Text Message** button is active, if you do not have a fax keycode enabled. If you add text or message headers to the message it does not remain as a voice message. It becomes a fax message.

If the **Include a message header when forwarding/replying** check box is selected without the BCM fax keycode the forward/reply message will not be delivered.

If **Include a message header when forwarding/replying** check box is not selected, the subject of a forwarded message contains the CLID information but, does not include the original sender's name or the sent time.

Configuring mail delivery folders for Outlook

Microsoft Outlook is automatically configured when you install Unified Messaging. By default, CallPilot messages are stored in a separate message store from the Outlook Inbox. Nortel recommends that subscribers keep their CallPilot messages separate from their Outlook messages. Keeping CallPilot messages separate makes it easier to prioritize messages and identify message types.

If the subscriber requests it, you can configure Outlook to store all incoming e-mail and CallPilot messages in the CallPilot message store.

Note: If you configure the e-mail client to deliver messages to the CallPilot Inbox, all e-mail messages are stored on the subscriber's hard drive. After the message is delivered, the messages no longer resides on the Exchange server.

To specify where to deliver e-mail messages

1. On the Outlook window, on the **Tools** menu click **Services**
   or
   if you use Outlook XP or 2003, click on the **Tools** menu and then click **E-mail accounts**.
   The E-mail account window appears.
   Select **View or Change existing E-mail accounts.**
   Click **Next**.
2. Click the **Delivery** tab.
3. From the **Deliver new mail to the following location** list, select **CallPilot Messaging Store** and click the up arrow to move it to the top of the list.
4. Click the **OK** button.

Configuring Outlook 2002 and 2003

Outlook 2002 and 2003 handle mail accounts differently than previous versions of Outlook. This section describes how to configure the Unified Messaging options for Outlook 2002 and 2003.

To set Unified Messaging options

1. In Outlook, on the **Tools** menu, click **E-mail Accounts**.
   The E-mail Accounts wizard appears.
2. Choose **View or change existing e-mail accounts**, and then click **Next**.
3. In the e-mail account list, choose **CallPilot Desktop Messaging**, and then click **Change**.
   The Desktop Messaging options dialog box appears.
4. Make changes to Unified Messaging settings, as required, and then click the **OK** button.
5. Click **Finish** to exit the E-mail Accounts wizard.

Using Outlook 2002 and 2003 as an Internet mail client

In Outlook 2002 and 2003, Corporate mode and Internet Mail do not exist. Instead, the subscriber can manage all Exchange server, IMAP and POP server, and web-based e-mail accounts from the same interface.

This section describes how to configure Outlook 2002 and 2003 as an Internet Mail client that works with Unified Messaging for Internet Mail clients.

If the subscriber uses Unified Messaging with an Exchange server, you should install Unified Messaging for Outlook on their computer. The Unified Messaging installation program automatically configures Outlook with the required settings.

To define the CallPilot mailbox settings

1. In Outlook, on the **Tools** menu click **E-mail Accounts**.
   The E-mail Accounts wizard appears.
2. Select **Add a new e-mail account**, and then click **Next**.
   The E-mail Servers page appears.
3. Select **IMAP**, and then click **Next**.
   The Internet E-mail Settings (IMAP) page appears.
4. Specify the settings for the subscriber's CallPilot mailbox.
   - **User Information** — Type the subscriber's name and CallPilot address in the boxes. Enter the address in the form:
     <SMTP/VPIM prefix><mailbox number>@<local CallPilot server>
   - **Logon Information** — Type the subscriber's CallPilot mailbox number and password in the boxes.
   - Do not select the **Log on using Secure Password Authentication (SPA)** check box.

- **Server Information** — Enter the CallPilot fully qualified domain name (FQDN) for both the incoming and outgoing servers.

5 Click **Next**.
A message appears that confirms the changes.

6 Click **Finish**.

To configure access to the CallPilot Address Book

1 In Outlook, on the **Tools** menu click **E-mail Accounts**.
The E-mail Accounts wizard appears.

2 Select **Add a new directory or address book**, and then click the **Next** button.

3 Select **Internet Directory Service (LDAP)** and then click the **Next** button.

4 In the **Server Name** box, type the CallPilot FQDN.

5 In **Logon Information**, select **This server requires me to log on** check box.

6 Enter the user's username and password in the **User Name** and **Password** boxes.
The user name is the mailbox number and the password is the mailbox password.

7 Click the **More Settings** button.
A message appears that says that the account you created will not start until you restart Outlook.

8 Click the **OK** button.

9 Under the **Search** tab in the **Search Base** box, type *ou=users,ou=callpilot.*

10 Click the **OK** button.

11 Click the **Next** button.
A message appears that confirms the changes.

12 Click the **Finish** button.

To configure text formatting

1 In Outlook, on the **Tools** menu click **Options**.

2 Click the **Mail Format** tab.

3 In the **Message Format** section, select **Plain Text**.

4 Click **OK**.

Configuring Novell GroupWise

This section describes how GroupWise is integrated with CallPilot. For information on how to use GroupWise to address, compose, open, delete, and perform other CallPilot operations, refer to the *CallPilot 4.0 Desktop Messaging User Guide for Novell GroupWise.*

Note: If the subscriber uses Novell GroupWise, the subscriber must have Windows Messaging 4.0 installed on their computer. Windows Messaging is usually installed when Windows is installed on a computer. However, if Windows Messaging 4.0 is not installed, the GroupWise installation gives you these options:

- Install the complete Windows Messaging system.
- Leave Windows Messaging as is.

Install the Complete Windows Messaging system even if Windows Messaging is already installed. This ensures that the GroupWise option is available during Unified Messaging installation.

After you install GroupWise, you must configure it for Unified Messaging.

Removing the CallPilot Message Store

When you install Unified Messaging on the computer of a subscriber who uses GroupWise, the CallPilot Message Store folder is added to the subscriber's GroupWise mailbox.

You or the subscriber can use this procedure to remove the CallPilot Message Store from GroupWise.

To remove the CallPilot Message Store

1. Click the Windows **Start** button, point to **Settings** and click **Control Panel**.
   The Control Panel window appears.
2. Click the **Add/Remove Programs** icon.
   The Add/Remove Programs Properties dialog box appears.
3. In the list select **CallPilot Unified Messaging for Novell GroupWise**.
4. Click the **Remove** button.
   The dialog window opens to confirm the deletion.
5. Click **OK**.

To configure GroupWise for Unified Messaging

1. Start GroupWise.
2. On the **Tools** menu click **CallPilot**, point to **CallPilot Configuration**, and click **CallPilot Configuration Menu**.
   The CallPilot Unified Messaging dialog box appears.

3 In the **Server** box, enter the Business Communications Manager system name or IP address.

4 In the **SMTP/VPIM prefix** box **enter** the SMTP/VPIM prefix of the subscriber's address. If the Network Messaging option is not enabled, leave this box blank. If Network Messaging is installed, enter the value in CallPilot Manager, in the Digital Networking Properties page, in the Local Prefix box.

5 In the **Mailbox** box, enter the subscriber's mailbox number.

6 On the Mail tab, select **Manually** at **Check for new messages (Automatically/Manually)**, if the subscriber uses ISDN or dial-up. This option saves on toll charges by not continuously checking for new messages on the Business Communications Manager system.

7 On the Mail tab, select **Include original message header when forwarding or replying,** if you have a fax keycode enabled. This adds header information to each forward or reply, so that Unified Messaging messages are consistent with other e-mail messages.
Do not select **Include original message header when forwarding or replying,** if you do not have fax enabled because the message will not be sent.
If you do not select **Include original message header when forwarding or replying**, the forwarded message contains the CLID information, but does not include the original sender's name or sent time.

Note: When you choose to include the original message header, when you forward or reply to a Unified Messaging message, the Business Communications Manager treats the voice message as a fax.

8 On the Mail tab, select **Include cover page when forwarding fax**.
If this option is selected, the user will be able to choose and set a default cover page from a list of available cover pages.

9 Select the **Remember password** check box if the subscribers do not want to enter their password each time they log on.

10 Click the **Address Book** tab.

11 In the **Path** box enter the location of the local CallPilot address book.

12 From the **Order** list box, select the order in which you want the names to be displayed in the address book.

13 Select the **Remind me to download address book every __ day(s)** if subscribers want to download addresses automatically from the system. The default is every 20 days. Subscribers can change the number of days, if they wish. If subscribers do not want to download the address book, do not select this check box.

14 If you want to download the address book now, click the **Download now** button. **S**ubscribers can click this button whenever they want to download the address book.

15 Click the **Apply** button.

16 Click the **Audio** tab.

17 Select the **Choose audio device before each audio session** check box if the subscribers do not use either the telephone or computer to listen to their messages on a regular basis.

18 Click the **Download file before playing** check box if subscribers want to download messages before they play them. After the message downloads, subscribers can play the message additional times without delay, and use GroupWise to forward it to another CallPilot subscriber.

19 From the **Audio device** setting, select either **Computer** or **Telephone** as the playback and recording device. If you select **Telephone**, enter a telephone number and click **Add**. All telephone numbers are stored, which is useful if the subscriber listens to or records messages from multiple locations.

20 Click the **Apply** button.

21 Click the **Volume Control** tab.

22 Select the default speaker and microphone volumes from this tab. The microphone level can be changed only from this dialog box. The subscriber can change the volume level and the volume control on the player from this dialog box. The selected volume level is used for future player sessions.

23 Click **OK** to save your changes and close the dialog box.

Configuring Lotus Notes

Updating the Mail database

In Lotus Notes, the Mail database design determines which messages appear in the Notes message list. There are two ways to update the database design for Desktop Messaging:

- **automatic update**: this updates the database automatically when you install Unified Messaging (recommended).
- **manual update**: you or the subscriber must update the database manually after you install Desktop Messaging.

Nortel recommends the automatic update option. It provides the optimal configuration for message storage, is compatible with customized database designs, and does not require any manual updates to the database design.

Updating the database automatically

To automatically update the Mail database, select the Update Lotus Notes Databases option when you install Unified Messaging. When the installation is complete, Unified Messaging is ready to use and does not require any manual changes to the Mail database.

When you use this update method, Lotus Notes stores CallPilot messages in a separate folder. This configuration lets users easily prioritize CallPilot messages since they are not mixed with other e-mail messages.

Updating the database manually

You should update the database design manually only if:

- the subscriber wants CallPilot messages stored in the same Inbox as their Lotus Notes e-mail messages
- the subscriber's database design has not been customized, and the subscriber does not intend to customize the database design in the future
- you are familiar with modifying Lotus Notes database design

To perform a manual update, you must replace the current database design using a CallPilot template. Replacement of the database design removes any customization in the current database design.

To update the Mail database design manually

1. Start Lotus Notes.
2. On the **Help** menu select **About Notes Desktop**.
   Make a note of the version of Lotus Notes.
3. Click the **Mail** database. The Mail database has the subscriber's name and the envelope icon.
4. On the **File** menu, click **Database**, and then click **Replace Design**.
   The Replace Database Design dialog box appears.
5. Select **Template Server**.
   The Template Server window appears.
6. Select **Local**, and then click **OK**.
7. Select the **Show advanced templates** check box.
8. From the list box, select the version of CallPilot Mail for the version of Lotus Notes that you use.
9. Click **Replace**.
   A message appears that asks you to confirm your request to change the database view.
10. Click **Yes**.

Removing password prompts

By default, Lotus Notes prompts for a Notes password when you access an application linked to Lotus Notes. This means that when Unified Messaging for Lotus Notes is installed, subscribers must enter their Notes password twice: when they start Lotus Notes, and the first time they access the Unified Messaging folder during the Lotus Notes session. To remove the Lotus Notes password prompt for Unified Messaging, subscribers must follow this procedure.

To remove the Lotus Notes password prompt for Unified Messaging

Lotus Notes 5.0:

1. In Lotus Notes, on the **File** menu click **Tools** and click **User ID**.
   The Enter Password dialog box appears.
2. Type your **Notes** password, and then click the **OK** button.
   The User ID dialog box appears.
3. Select the **Don't prompt for a password from other Notes-based programs** option, and then click the **OK** button.

Lotus Notes 6.0:

1. In Lotus Notes, on the **File** menu, click **Security** and click **User Security**.
2. Type your Notes password, and then click the **OK** button.
3. Select the **Don't prompt for a password from other Notes-based programs** option, and then click the **OK** button.

Configuring Internet Mail clients

CallPilot Unified Messaging supports these Internet Mail clients:

- Outlook Express
- Outlook in Internet mail mode

You need the following information to configure your Internet mail client:

- the FQDN or IP address of the Business Communications Manager system
- the subscriber's CallPilot mailbox number and password
- the SMTP/VPIM prefix of the Business Communications Manager system. If you use Message Networking, include this prefix. Enter the value from the Local Prefix box of the Digital Networking Properties page in CallPilot Manager.

You can provide this information to subscribers if you want them to configure the client.

Configuring Outlook Express or Outlook in Internet Mail mode

If your Internet Mail client is Microsoft Outlook Express or Outlook, use the following procedures. Depending on the Internet client you use, the options you see can be slightly different.

To configure an IMAP account on Outlook or Outlook Express

1. Start Outlook.
2. On the **Tools** menu:

- if you use Outlook 2000, select **Services**
- if you use Outlook 2002 or 2003, select **E-Mail Accounts**

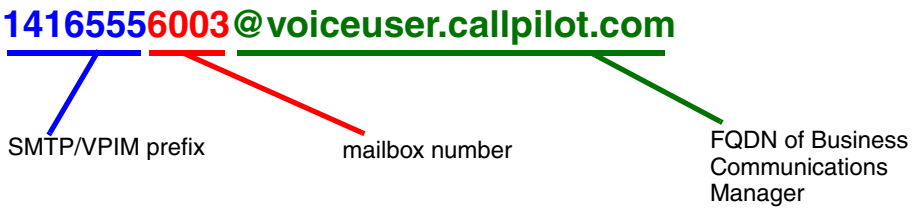
The Internet Accounts screen appears.

3 Click **Add**, and then click the **Mail** option.
The Internet Connection Wizard starts up.

4 In the **Display name** box, type your name.

5 Click the **Next** button.
The Internet Connection Wizard - Internet E-mail Address screen appears.

6 In the **E-mail address** box, type the subscriber's CallPilot mail address in the form:



- 1416555 is the SMTP/VPIM prefix. If you use Message Networking, include this prefix.
- 6003 is the CallPilot mailbox number.
- voiceuser.callpilot.com is the FQDN of the Business Communications Manager system. If your network does not use DNS, enter <hostname>.localdomain as the FQDN (where the host name is that of the Business Communications Manager system).

7 Click the **Next** button.
The E-Mail Server Names screen appears.

8 From the list box, choose **IMAP** as the incoming mail server type.

9 In the **Incoming mail server** box, type your FQDN.

10 In the **Outgoing mail server** box, type your FQDN.

11 Click the **Next** button.
The Internet Mail Logon screen appears with the subscriber's IMAP account name displayed.

12 In the **Password** box, type the subscriber's CallPilot mailbox password.
Do not select the **Log on using Secure Password Authentication (SPA)** check box.

13 Click the **Next** button.
The Internet Connection Wizard - Internet Mail Logon screen appears.

14 In the **Account name** box, type the subscriber's SMTP/VPIM prefix and mailbox number.

15 In the **Password** box, type the subscriber's mailbox password.

16 Click the **Next** button.
The Internet Connection Wizard - Congratulations screen appears.

17 Click the **Finish** button and close the Internet Accounts screen.
A message appears that asks if you want to download folders from the mail server you added.

18 Select the **Yes** button to download the folder list for the IMAP account that you just created
or
select the **No** button if you do not want to download the folder list at this time.
Tip: To make changes to your new IMAP account, select the account name and click Properties to display the Properties page.

19 Click the **OK** button.

To configure an LDAP directory service for Outlook Express or Outlook

Depending on the Internet client you use, the options you see can be slightly different.

1 Start Outlook.

2 On the **Tools** menu, click **Accounts**.
The Internet Accounts screen appears.

3 Click the **Directory Service** tab.

4 Click the **Add** button and click **Directory Service**.
The Internet Connection Wizard starts.

5 In the **Internet directory (LDAP) server** box, type the FQDN or IP address of the Business Communications Manager system.

6 Select the **This server requires me to log on** check box. Then enter the **Account Name** or **User Name** and **Password.**
The user name or account name is the mailbox number. The password is the mailbox password.

7 Click the **Next** button.
The Internet Connection Wizard - Check E-mail Addresses screen appears.

8 If the subscriber wants to check for addresses in the CallPilot LDAP directory when they address messages, select **Yes**.

9 Click the **Next** button.
The Internet Connection Wizard - Congratulations screen appears.

10 Click the **Finish** button.
The Internet Accounts screen appears.

11 Click the **Properties** button, and then click the **Advanced** tab.

12 If your network is slow, move the slide bar under **Search timeout** toward **Long** to increase the timeout.

13 If the subscriber expects to do directory searches that return more matches than the number shown, increase the number in the **Maximum number of matches to return** box.

14 In the **Search base** box, type the search base for the CallPilot directory.
The search base is *ou=users,ou=callpilot*.

15 Click the **OK** button.
The Internet Accounts screen appears again.

16 If the subscriber wants to check for addresses in the CallPilot LDAP directory, click the **Set Order** button. The Directory Services Order screen appears. If necessary, use the **Move Up** or **Move Down** buttons to position the CallPilot LDAP directory in the search order.

17 Click the **OK** button.
The Internet Accounts screen appears.

18 Click the **Close** button.

To configure special settings for Outlook Express or Outlook in Internet Mail mode

1 Select the settings for the type of Outlook the subscriber uses.

- If the subscriber uses Outlook Express:

a On the **Tools** menu, click **Options**.
The Options screen appears.

b Click the **Send** tab.

c From **Mail sending format**, select **Plain Text**.

d Click the **Plain Text Settings** button.
The Plain Text Settings screen appears.

e From **Message format**, select **MIME**.

f From the **Encode text using** list box, select **None**.

g Click the **OK** button.

- If the subscriber uses Outlook 98:

a On the **Tools** menu, click **Options**.

b Click the **Mail Format** tab.

c From **Send in this message format**, select **Plain Text**.

d Click the **OK** button.

2 If the subscriber has addresses from the CallPilot LDAP directory in their Outlook Express personal address book:

- In the Address Book, right-click the recipient's name.
- Select **Properties**, and then select the **Name** tab.
The Properties screen appears.
- Select the **Send E-Mail using plain text only** check box.
- Click the **OK** button.

To test the Outlook Express or Outlook in Internet Mail mode IMAP account

1. Use your telephone to log on to your CallPilot mailbox.
2. Compose a test voice message and send it to the subscriber.
3. Have the subscriber check that the message appears in their Outlook or Outlook Express Inbox.

Installing Unified Messaging in a Citrix Thin Client environment

The system administrator of a Citrix Thin Client environment must install and configure Unified Messaging on the Windows Terminal Server before users can access it. Unified Messaging should only be installed on the Windows Terminal Server; do not install Unified Messaging on the client computer.

Supported Platforms

Unified Messaging in the Citrix Thin Client environment is supported on the Business Communications Manager platform.

Unified Messaging supports the following Thin Clients:

- Citrix Metaframe Presentation Server 4.0 on Windows 2003 Server (All Editions)
- Citrix Metaframe XP on Windows 2000 Server (All Editions) and Windows 2003 Server
- Citrix Metaframe Presentation Server 3.0 on Windows 2003 Server

Citrix Thin Clients must be running Windows 2000, or Windows XP.

Installing Unified Messaging on the Windows Terminal Server

Installing Unified Messaging in a Citrix Thin Client environment is a straightforward process. It is nearly identical to installation in a standard desktop client environment. Deviations from the standard environment are detailed in this section.

The common desktop exceptions to the installation process for a standard environment include:

For Microsoft Outlook and Novell GroupWise: The installer automatically disables the *Update default mail profile* feature. This feature is not applicable to the Windows Terminal Server.

For Lotus Notes: The installer automatically disables the *Update Lotus Notes mail database* and *Update Lotus Notes Personal Address Book* features. These features are not applicable to the Windows Terminal Server.

To update the users mail databases, the Lotus Notes/Domino server administrator must run the LNSERVER.EXE installation program on the Lotus Notes/Domino Server. The administrator can then use the installed utility application to update selected user mail databases with CallPilot design elements. For more information refer to, "Updating the mail database manually" on page 46.

To enable the CallPilot address book, the Lotus Notes/Domino Server administrator must populate and maintain the CallPilot Public Address book on the server. The administrator may choose to call NMLNADBK.EXE as a scheduled task to automate the CallPilot Public Address Book update. For more information refer to,"To set up the automatic update utility" on page 47.

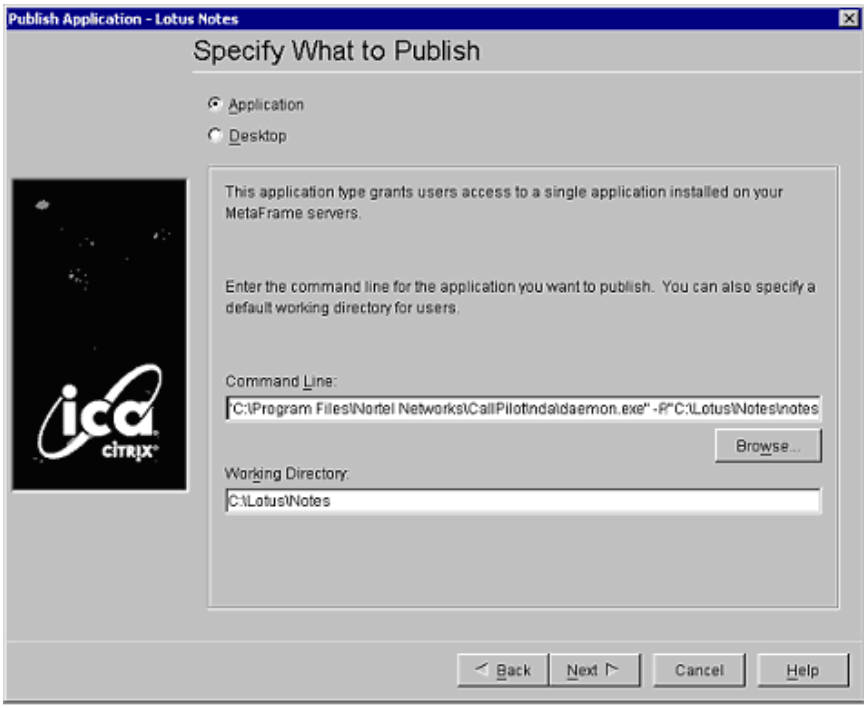
Configuring Unified Messaging in a Citrix Thin Client environment

When publishing applications on the Windows Terminal Server, the system administrator should manually update the program's command line. This is required to provide access to the Nortel Fax/ Nortel Fax Batch printers.

This step may be skipped if access to the Nortel Fax/Nortel Fax Batch printers is not required. This step may also be skipped when publishing the Window's desktop.

Providing access to the Nortel Fax/Nortel Fax Batch printers

1. Add double quotes around the original command line (if not already present).
   “C:\Lotus\Notes\notes.exe”
2. Add the following text in front of the quoted command line for any application from which you wish to print (not just Lotus Notes):
   "C:\Program Files\Nortel\CallPilot\fax\daemon" -P (or in some cases -A)
   The command line should now read:
   "C:\Program Files\Nortel\CallPilot\nda\daemon" -A“C:\Lotus\Notes\notes.exe”
   (the use of -A in this example, as opposed to -P, is explained below)


Publish Application - Lotus Notes
Specify What to Publish
Application
Desktop
This application type grants users access to a single application installed on your MetaFrame servers.
Enter the command line for the application you want to publish. You can also specify a default working directory for users.
Command Line:
"C:\Program Files\Nortel Networks\CallPilot\nda\daemon.exe" -P"C:\Lotus\Notes\notes
Browse...
Working Directory:
C:\Lotus\Notes
Back
Next
Cancel
Help

Note: The default installation location is “C:\Program Files\Nortel\CallPilot.” However, this may have been altered by the system administrator when CallPilot was installed.

The -P option should work for most applications. However, if an application still does not work with the Nortel Fax/Nortel Fax Batch printers, use the option -A instead of -P. Lotus Notes requires -A instead of -P.

The -P and -A options are both used by daemon.exe to monitor the original application for print requests. The -P option instructs daemon.exe to monitor only the original application. The -A option instructs daemon.exe to monitor the original application as well as any secondary applications created by the original. The -A option is more CPU intensive and should only be used when the -P option does not work.

Printing faxes

The system administrator must set up permission for each user to print faxes:

- Make the user a member of the administration or a power user group.
  or
- Give the user modify permissions for the CallPilot or nda folder and subfolders.
  or
- Manually create a user folder in the nda directory.

Citrix Thin Client Configuration overview

Citrix Thin Client support allows users to access most of the features of the Unified Messaging Client in a Windows Terminal Server environment running Citrix software. This environment provides a single point of administration for all users in the network.

When the system administrator installs Unified Messaging on the Windows Terminal Server, users only need to perform minor (if any) configuration changes to use the application.

Once Unified Messaging has been configured, using it in a Citrix Thin Client environment is nearly identical to using it in a Standard Desktop Client environment.

One of the few limitations of the Citrix Thin Client environment is the inability to adjust the client's speaker volume and microphone level. Adjusting these settings only affects the Windows Terminal Server. Therefore, the speaker volume and microphone level controls are disabled in the CallPilot Audio Player.

Configuration differences from the standard Desktop Client environment are detailed in the following sections.

Configuring Microsoft Outlook

The Citrix Administrator performs the following steps so Citrix users can automatically configure Unified Messaging using Microsoft Outlook.

1. Publish an application and call it CallPilot Desktop client or another name of their choice.
2. Configure the Command Line field for the application to:
   C:\"Windows directory"\system32\nmdcinst.exe -i -default

and
Working Directory to: C:\"Windows directory"\system32

3 Save the application.

Once the administrator had installed Unified Messaging on the Windows Terminal Server, each Citrix Thin Client user must add Unified Messaging to their client computer's mail profile.

Automatic Configuration

Users can automatically add Unified Messaging to their default e-mail profile. Users click on the published application that the Citrix Administrator created.

After the Citrix users run the published application, Microsoft Outlook is configured for CallPilot and they do not run the application again.

Citrix users can also manually configure their Outlook profile.

Manual Outlook 2002 (XP) and 2003 Configuration

The user can manually add Unified Messaging to any e-mail profile in Outlook.

To manually configure Unified Messaging

1 Open the mail control panel applet.

2 In the Mail Setup dialog box, click **E-mail Accounts** to add CallPilot to the current e-mail profile, or click **Show Profiles** to choose another profile.

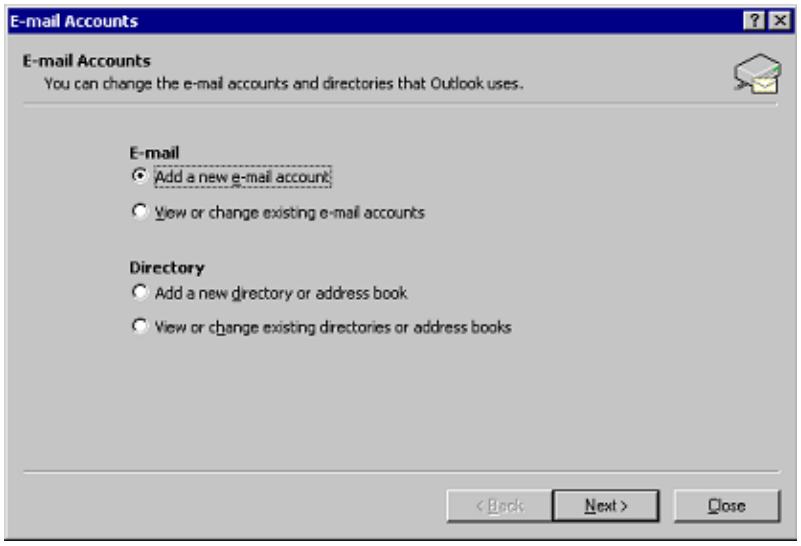
If you click Show Profiles, then:

a Select the profile you wish to use.

b Click **Properties**.

c Click **E-mail Accounts**.

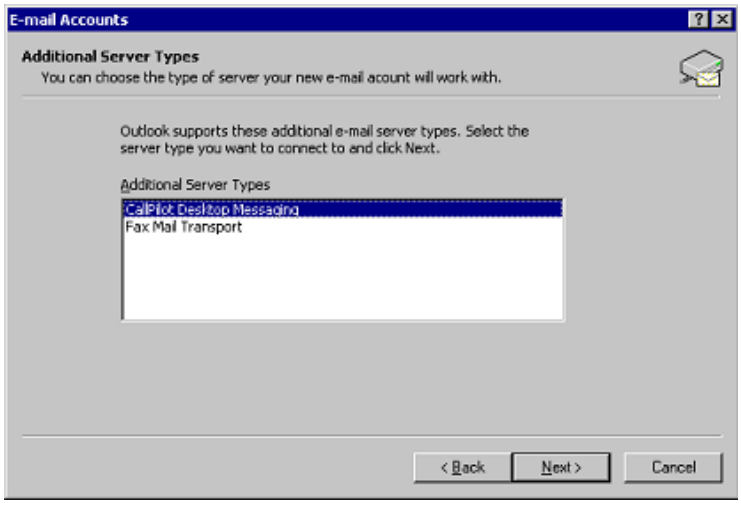
3 In the E-mail Accounts dialog box, select **Add a new e-mail account** and click **Next**.


E-mail Accounts
E-mail Accounts
You can change the e-mail accounts and directories that Outlook uses.
E-mail
Add a new e-mail account
View or change existing e-mail accounts
Directory
Add a new directory or address book
View or change existing directories or address books
< Back
Next >
Close

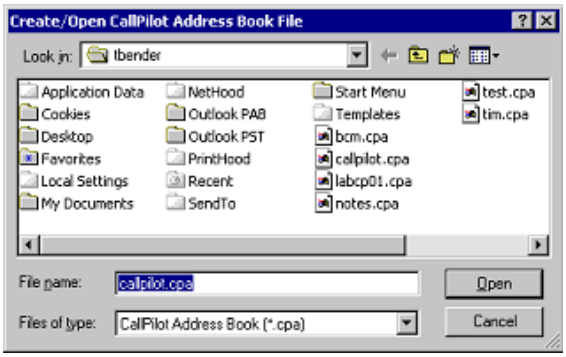
4 Select **Additional Server Types** and click **Next**.

E-mail Accounts
Server Type
You can choose the type of server your new e-mail acount will work with.
Microsoft Exchange Server
Connect to an Exchange server to read e-mail, access public folders, and share documents.
POP3
Connect to a POP3 e-mail server to download your e-mail.
IMAP
Connect to an IMAP e-mail server to download e-mail and synchronize mailbox folders.
HTTP
Connect to an HTTP e-mail server such as Hotmail to download e-mail and synchronize mailbox folders.
Additional Server Types
Connect to another workgroup or 3rd-party mail server.
< Back
Next >
Cancel

5 Select **CallPilot Desktop Messaging** and click **Next**.


E-mail Accounts
Additional Server Types
You can choose the type of server your new e-mail acount will work with.
Outlook supports these additional e-mail server types. Select the server type you want to connect to and click Next.
Additional Server Types
CallPilot Desktop Messaging
Fax Mail Transport
< Back
Next >
Cancel

6 Click **Open** in the **Create/Open CallPilot Address Book File** window.

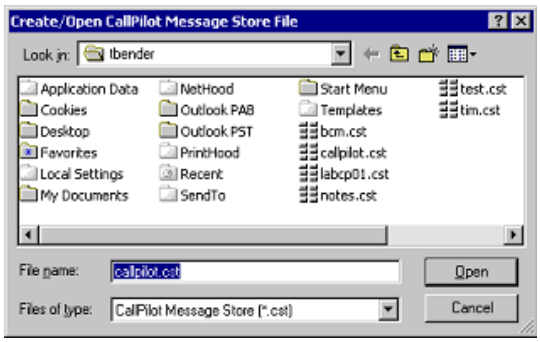


The default location in the **Create/Open Address Book File** window is set to the user's profile section on the Windows Terminal Server. The location of the user's profile in the default location prevents inadvertent access or overwrite of another user's files.

Nortel does not recommend changing the default location of the Address Book file. If the Address Book location is changed, conflict with other users can occur.

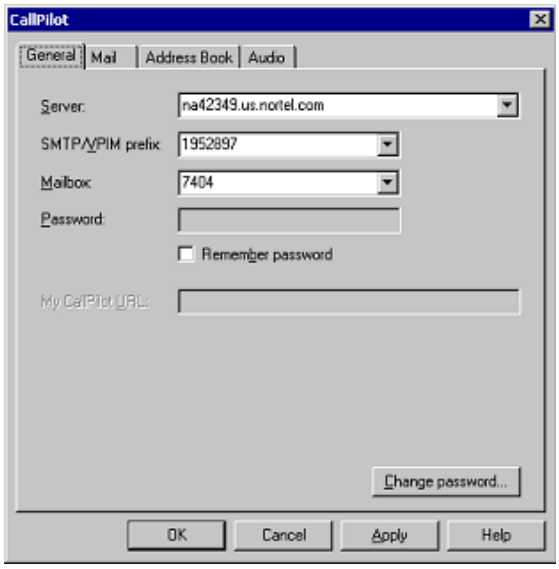
Initially, changing the location of the Address Book File to a location shared by all users can seem worthwhile. The system administrator then can maintain one copy of the Address Book to be shared by all users. However, a shared address book can contain entries (SDLs, BDLs, or PDLs) not applicable to all users. While the CallPilot Server prevents unauthorized use of Address Book entries, sharing the address book file among multiple users can cause confusion.

Since the address book files for all users are stored on the same computer, users need to be aware of how secure their data is. The level of security depends upon how the Windows Terminal Server has been configured by the system administrator. Click **Open** in the **Click Open in the Create/ Open CallPilot Message Store File** window.

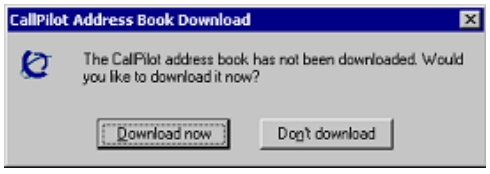


Nortel does not recommend changing the default location of the Message Store file. If the user changes the location of the Message Store file, it can conflict with another user. The location of the user's profile in the default location prevents inadvertent access or overwrite of another user's files.

7 Enter your **CallPilot Mailbox Number** in the **Mailbox** field and click **OK**.



8 Download the CallPilot Address Book (if prompted).


CallPilot Address Book Download
The CallPilot address book has not been downloaded. Would you like to download it now?
Download now
Don't download

9 If you choose to download the Address Book, click **OK** to when the download is complete.

10 Close any remaining windows to complete the configuration.

Manual Outlook 2000 Configuration

The user can manually add CallPilot Desktop Messaging to any e-mail profile in Outlook 2000.

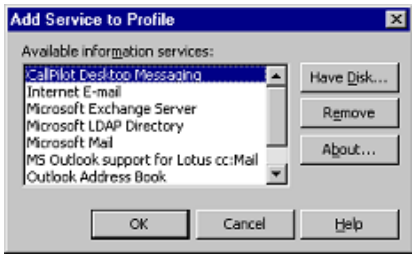
To manually configure CallPilot Desktop Messaging for Outlook 2000

1. Open the mail control panel applet.
2. Click **Add...** to add CallPilot to the current e-mail profile, or click **Show Profiles…** to choose another profile.

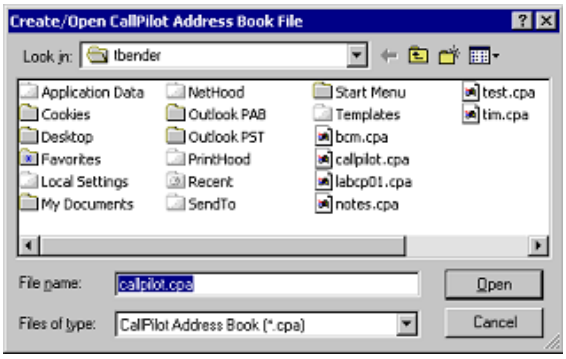
If you click **Show Profiles…**, then:

- **a** Select the profile you wish to use.
- **b** Click **Properties**.
- **c** Click **Add**.

3. In the Add Service to Profile dialog box, Select **CallPilot Desktop Messaging** and click **OK**.



4. Click **Open** in the **Create/Open CallPilot Address Book File** window.



The default location in the Create/Open Address Book File window is set to the user's profile section on the Windows Terminal Server. This prevents one user from inadvertently accessing or overwriting another user's files.

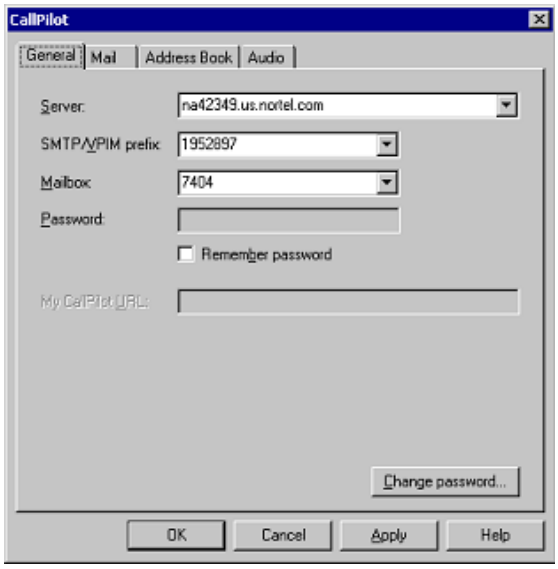
Nortel does not recommend changing the default location of the Address Book file. If the user changes the location of the Address Book file, changing location can conflict with another user.

Since the address book files for all users are stored on the same computer, users need to be aware of how secure their data is. The level of security depends upon how the Windows Terminal Server has been configured by the system administrator.

5 Click **Open** in the **Click Open in the Create/Open CallPilot Message Store File** window.

Nortel does not recommend changing the default location of the Message Store file. If the user changes the location of the Message Store file, it can conflict with another user. The location of the user's profile in the default location prevents inadvertent access or overwrite of another user's files.

6 Enter your CallPilot Mailbox Number in the **Mailbox** field and click **OK**.



7 Close any remaining windows to complete the configuration.

Configuring Lotus Notes

The administrator must install Unified Messaging on the Windows Terminal Server and update the mail databases on the Domino server. Once this is done, Citrix Thin Client users can run the CallPilot-enabled Lotus Notes client.

When Lotus Notes Client starts for the first time after server configuration is completed, Unified Messaging detects the updated mail database, makes all required modifications in Lotus Notes client initialization file (NOTES.INI) and prompts the user to finalize the configuration by restarting the Lotus Notes client.

Note: The administrator must download ***CallPilotLotusServerTools.exe*****,** from the Business Communications Manager web page, to manually update the mail databases.
The administrator can use the Lotus Notes Server Tools to:

- place CallPilot messages within the Lotus Notes Inbox with e-mail messages
- update the user mail database on the Lotus Notes Server
- configure the automatic update utility as a scheduled task to update the CallPilot address book stored on the Notes server

Updating the mail database manually

A Lotus Notes administrator can manually update one or more mail databases from the Lotus Notes server by running an update utility. By running the update utility, you can add the Unified Messaging folders and views to the user's mail database without affecting any previous customization to the database.

Alternatively, a Lotus Notes administrator or user can replace the database design. Replacement of the mail database removes all customization to the database. Administrators and users should only replace the database under special circumstances. Users may consider replacing database design only if they want CallPilot messages to be placed within the Lotus Notes Inbox, along with e-mail messages.

To update the database design from the Lotus Notes server

1. Download the CallPilotUnifiedMessagingLotusServertools.exe from the Business Communications Manager web page.
2. Run CallPilotUnifiedMessagingLotusServertools.exe from the Lotus server. This installs LNSERVER.EXE files on the Lotus server and automatically runs LNSERVER.EXE.
3. Start Update database design. From the Start menu, choose **Programs > Nortel CallPilot Unified Messaging > Update Database Design**.
   The Update CallPilot mail databases dialog box appears.
4. Select **Add CallPilot components**, and then click **OK**.
   The Select database(s) dialog box appears.

5 Select mail files to update, and then click **Open**.

To add the CallPilot database to the Lotus Notes workspace

1 Run LNSERVER.EXE.
An empty callpilot.nsf is copied to the Lotus Notes server.

2 From the Lotus Notes workspace, choose **File > Database > Open**.
The Open Database dialog box appears.

3 Open the **Lotus Notes database** from the Server.
Ensure that you open the database from the Server, not locally.

4 In the database list, find CallPilot Address Book database (filename: callpilot.nsf)

5 Click **Select** or **Open**.

6 Click the **Add Icon** to add the icon to the Server Workspace.
The new icon appears on the Lotus Notes server workspace.

7 Click the **icon**, then open the address book.

8 Choose **View > CallPilot (People)**.

9 Choose A**ctions > Download CallPilot Address Book**

Note: To download the address book, you must have a valid CallPilot mailbox and password. Contact your System Administrator if you do not have a password.

10 If the Download CallPilot Address Book command is disabled on the actions menu, complete the following steps:

a Open the **callpilot.nsf** file in Designer Mode.

b Select **Actions > Download CallPilot Address Book**.

c Select **Edit > Properties**.

d Ensure the **Hide Action if Formula is True** check box is not selected.

e Close the **Properties** window.
The Download CallPilot Address Book command should be available.

To set up the automatic update utility

1 Run LNSERVER.EXE if it has not already been run.
To avoid entering the Lotus Notes password multiple times, configure Notes to share the Notes password with Notes programs. For more information, see "Password prompts" on page 48.

2 Open the Public Address Book.

3 Navigate to Folders and Views/Servers/Program.

4 Select **Program**, and then click **Add Program**.
The Program page appears.

5 Type nmlnadbk.exe in the **Program name** box. Ensure the Command line box is empty.

6 Set Enabled/disabled to **ENABLED**.

7 Select the time and frequency that you want the update utility to run.

8 Click **Save**, and then close the dialog box.
Notes updates the address book based on the specified schedule.

Password prompts

By default, Lotus Notes prompts for a Notes password when you access an application linked to Lotus Notes. When Unified Messaging for Lotus Notes is installed, you must enter the Notes password twice - when you start Notes, and the first time you access the Unified Messaging folder during the Notes session. If desired, users can disable the Notes password prompt for the Desktop Messaging folder.

To disable the Notes password prompt for Unified Messaging

1 In Notes, choose File> Tools> User ID.
The Enter Password dialog box appears.

2 Type your Notes password, and then click **OK**.
The User ID dialog box appears.

3 Check the option: **Don't prompt for a password from other Notes based programs**.

4 Click **OK**.

Configuring Novell GroupWise

The administrator must first install Unified Messaging on the Windows Terminal Server. Once this is done, each Citrix Thin Client user must add Unified Messaging to their client computer Novell Default Settings mail profile.

Automatic Configuration

Users can automatically add Unified Messaging to their Novell Default Settings mail profile by choosing **Start-> Programs-> CallPilot Desktop Messaging-> Add CallPilot to Default Mail Profile**.

The automatic Novell GroupWise configuration is only available when the Windows Terminal Server administrator has published the Window's desktop. Otherwise, all users must manually configure Novell GroupWise.

Manual Configuration

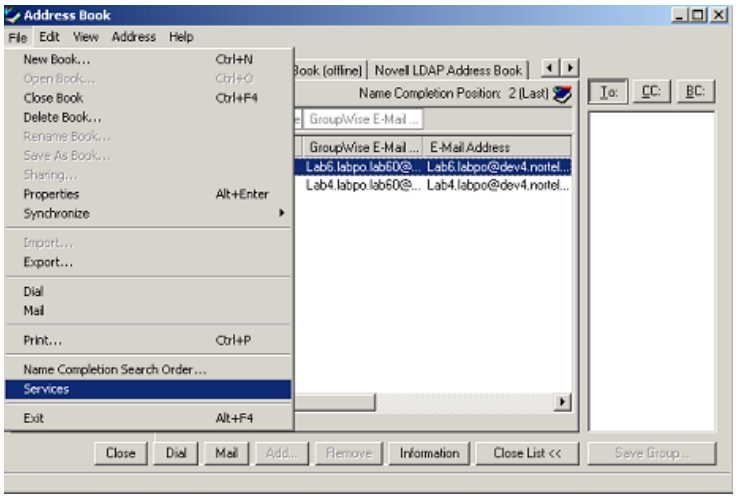
Users can manually add Unified Messaging to their Novell Default Settings mail profile.

To manually configure CallPilot

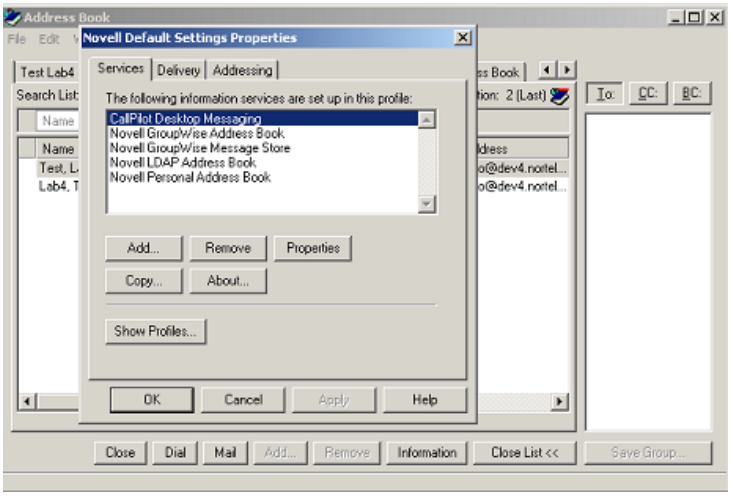
1 Log on to Novell GroupWise.

2 Open the **address book**.

3 Choose **File->Services**.



4 Once the Novell Default Settings Properties window appears, follow the steps in the section Manual Outlook 2000 Configuration to configure the CallPilot Desktop Messaging service, even if Outlook XP is installed on the computer.



5 Once configuration is complete, close and restart GroupWise.

Configuring Internet Mail clients

The administrator must install CallPilot Desktop Messaging on the Windows Terminal Server. Once this is done, Internet Mail Client users can follow the same instructions for using CallPilot as the standard Windows environment users.

Feature Limitations

There are some Unified Messaging feature limitations when you use a Citrix Thin Client.

Microsoft Outlook

Users of CallPilot Desktop Messaging have the ability to toggle between the CallPilot and Standard E-mail form. This setting is maintained in the HKEY_CLASSES_ROOT registry key.

In a Citrix Thin Client environment, all client computers refer to the same HKEY_CLASSES_ROOT registry key on the Windows Terminal Server.

As such, only the system administrator can toggle between the Standard Email and CallPilot forms, and the form they pick will apply to all users. The CallPilot installer will default to the CallPilot form.

In a Citrix Thin Client environment, all client computers must add CallPilot Desktop Messaging to their e-mail program. In a Standard Desktop environment, this is handled automatically by installation.

Lotus Notes

Users of the Lotus Notes CallPilot Desktop client must use the CallPilot Public Address Book located on the Lotus Notes/Domino Server.

Audio Player

There is a slight delay when the user clicks CallPilot Player buttons. The user will not be able to adjust the speaker volume from the CallPilot Audio player, CallPilot form, or CallPilot configuration. The user will not be able to use the CallPilot Audio Player microphone to record messages.

Fax Application

If the system administrator has installed CallPilot Desktop Messaging for more than one client (Outlook, Notes, GroupWise, Internet Mail) on the Windows Terminal Server, the Compose Fax dialog will list all available desktop clients that can be used to send the fax. This option is "sticky", meaning that the last option chosen is the first option shown the next time around.

In a Citrix Thin Client environment, this option is still "sticky", but it is controlled by all client machines. The last option chosen by any client machine will be the first option shown the next time regardless of the client machine.

Tracing

Running CPTrace won't show trace statements unless the system administrator has enabled CPTrace on the Windows Terminal Server.

Localization

While CallPilot Desktop Messaging supports several languages, only one language can be installed at a time. This prevents multiple languages from being installed on the Windows Terminal Server. All CallPilot users in a Citrix Thin Client environment must use the same language. This language can be non-English.

Installation

The system administrator must manually modify the command line of all published applications to provide access to the Nortel Fax / Nortel Fax Batch printers. Failure to do so prevents Citrix users from printing to the Nortel Fax / Nortel Fax Batch printers.

Security

The user does not have direct control over the file level access privileges of their CST file. This may leave their CST files (and the messages they contain) playable or viewable by other users if the Windows Terminal Server system administrator has not properly secured these files.

Windows XP

The Windows Terminal Server requires a Windows 2000 Server OS. Windows XP is not a server OS and will not be supported as a Windows Terminal Server running Citrix Metaframe software. Windows XP will be supported as a thin client running Citrix ICA software.

Chapter 4
Troubleshooting

This chapter is about:

- Troubleshooting during installation
- Troubleshooting logon problems
- Troubleshooting Lotus Notes logon problems
- Troubleshooting after logging on
- Internet Mail client error messages
- Accessing Unified Messaging online Help
- Using Unified Messaging Support Tools
- CPTrace

This chapter discusses problems that subscribers can experience with Unified Messaging. The troubleshooting information is divided into problems and suggested solutions. Based on the expertise of subscribers, you can ask them to do some of the troubleshooting procedures.

If the suggested solution does not correct the problem, contact your Nortel representative.

The problems discussed here apply to all clients unless otherwise noted. Perform the suggested procedures from the desktop computer, or, where noted, the Business Communications Manager or administration client.

Troubleshooting during installation

Before you begin to install Unified Messaging for Microsoft Outlook, GroupWise, or Lotus Notes, you require:

- the subscriber's CallPilot mailbox number
- the fully qualified domain name of the Business Communications Manager
- the SMTP/VPIM prefix of the BCM

Note: Before you install Unified Messaging, make sure the Integrated Client (Microsoft Outlook, GroupWise, or Lotus Notes) is working properly.

To obtain the Unified Messaging version number

1. If the subscriber cannot log on, but you require the CallPilot version number, navigate to: windows\system\nmdcva.exe
2. Right-click the file and select **Properties**.
   The Properties page appears.

3 Select the **Version** tab.
The version number for Unified Messaging is displayed.

Microsoft Outlook default mail client

You see the error message when you install Unified Messaging: “Either Outlook is not the default mail client or there is no default mail client to fulfill the current request.” If Outlook is installed on the subscriber’s computer but they do not want Outlook as the default mail client, the subscriber can change to another client after Unified Messaging is installed.

To define Outlook as the default mail client:

1 Click the Windows **Start** button, point to **Settings** and click **Control Panel**.
The Control Panel window appears.

2 Double-click the **Internet Options** icon.
The Internet Properties dialog box appears.

3 Click the **Programs** tab.

4 From the **E-mail** list box, select **Microsoft Outlook**.

5 Click the **OK** button.

No authorization to perform this operation

Subscribers must have Manager or Designer access control of the mail database to install Lotus Notes Unified Messaging. The Lotus Notes administrator sets this control on the server for each subscriber. The default is Manager access.

To determine the level of access control for a subscriber

1 From the subscriber’s Lotus Notes Mail database, click **File**, click **Database**, and click **Access Control**.

2 Click the subscriber’s name in the displayed list.
The subscriber’s access control level appears in the Access box. The choices are Manager, Designer, Editor, Author, Reader, Depositor, and No Access.
For a subscriber to install Unified Messaging, Manager or Designer must be displayed.

3 If neither Manager nor Designer is selected:

— you must temporarily give the subscriber Manager or Designer access

or

— the Lotus Notes administrator must manually update the Mail database from the server for each subscriber who needs CallPilot access.

This update creates a new view, CallPilot Unified Messaging, in Lotus Notes.

To update a CallPilot subscriber Mail database from the server:

1. Install CallPilot Unified Messaging on the Lotus Notes server computer by running **Server**, **setup.exe**.
2. Start **Update database design**.
3. To locate the Update database design program, click **Start**, point to **Programs**, point to **Nortel CallPilot Desktop** and click **Update database design**.
4. From **Update CallPilot Mail databases**, select **Add CallPilot components** or R**emove CallPilot components**.
5. Click **OK**.
6. From the **Select database(s)** dialog box, select one or a group of mail files to update.
7. Click the **OK** button.

Fax Printer Driver does not install

If a subscriber is installing Unified Messaging and tries to install the Fax Printer Driver, the fax driver installation fails after the subscriber is prompted for the administrator user name and password. (Unified Messaging still installs correctly.) This failure occurs if the client PC is running Windows 2000 with SP4 or later, and the subscriber performing the installation does not have administrator privileges.

To resolve this, you must alter the security policy of the subscriber performing the installation to allow the user to impersonate a client after authentication. Refer to the online Microsoft Knowledge Base article Q821546 for more information.

Troubleshooting logon problems

Invalid credentials

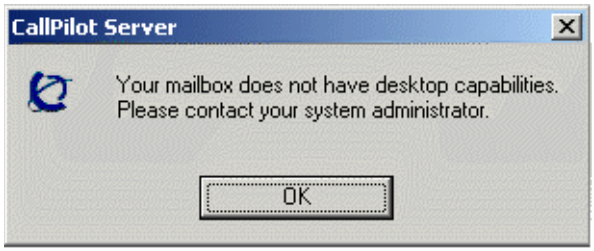
The subscriber sees messages such as “Invalid credentials. Please retry” or “The server could not be located. Please Retry.”

1. On the subscriber’s computer, check that Unified Messaging is configured with the proper settings. Verify that the following information is correct:
   - mailbox number
   - fully qualified domain name (FQDN) or IP address of the BCM
   - the SMTP/VPIM prefix of the BCM
2. Check that you can log on from the telephone using the same mailbox number and password.
3. Verify that you have network connectivity to the BCM.

   For example, issue a network command to the BCM exactly as it appears in your Unified Messaging configuration. Try to ping using the DOS prompt, and ensure that you receive a valid response from the BCM. If you do not have network connectivity to the BCM, you are not able to access Unified Messaging.
4. Ensure that DNS is configured on this computer. Under TCP/IP properties, select the DNS tab. Ensure that a DNS server is listed. Verify that it is the correct IP address for the DNS server.
5. Check with the DNS administrator whether the server name is in the DNS server. Verify that the correct host name is configured in the DNS server.
6. The following actions can be taken to resolve this situation:
   - Properly configure the CallPilot FQDN in the DNS server.
   - Refer to “Configuring environments without a DNS” on page 14 for instructions on configuring CallPilot Unified Messaging in an environment with no DNS server.

No desktop capabilities

The subscriber tries to log on and sees this message:

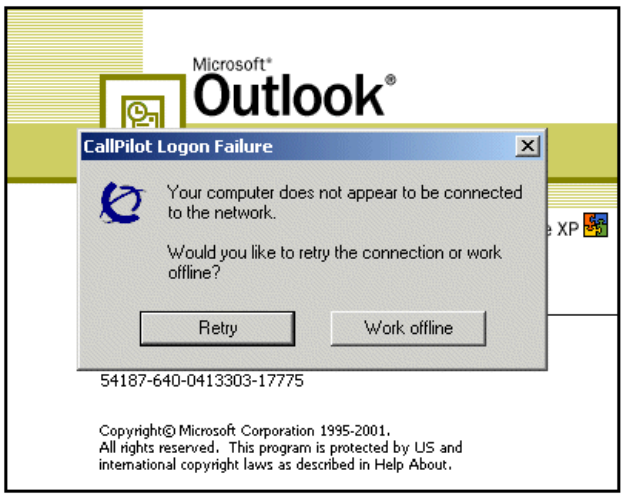


If this occurs, make sure that:

- you have enabled enough desktop messaging keycodes. If there are not enough keycodes enabled the subscriber will be able to log in to the mailbox through the telephone interface but not the desktop.
- there are enough mailbox keycodes enabled to support the number of mailboxes that are initialized in the system. If you have used all the mailboxes available on your system the subscriber will not be able to log on to the mailbox from the telephone or desktop.

CallPilot Logon Failure

The subscriber sees a message that the computer is not connected to the network.


Microsoft
Outlook
CallPilot Logon Failure
Your computer does not appear to be connected to the network.
Would you like to retry the connection or work offline?
Retry
Work offline
54187-640-0413303-17775
Copyright© Microsoft Corporation 1995-2001.
All rights reserved. This program is protected by US and international copyright laws as described in Help About.

Tell the subscriber to contact their network administrator.

Vista Windows Mail purge messages fail due to Microsoft limitations

To keep and show deleted messages in your Inbox

1. From the menu bar, navigate to **Tools > Options > Advanced**.
2. Select the **Use the Deleted Items Folder** with IMAP accounts.
   Deleted items remain in your Inbox.
3. While in your Inbox, navigate to **View > Current View**.
4. Select the **Show Deleted Messages** check box.
   Deleted items are shown in your Inbox.

Troubleshooting Outlook 2002 problems

The following issues can arise when Unified Messaging and Outlook 2000 work together. These issues should be resolved with a Microsoft Outlook service release patch.

Sending messages

When a subscriber who uses Outlook 2002 creates a CallPilot message in the CallPilot window, Outlook does not automatically send the message when the subscriber clicks the Send button. To send the message, the subscriber must click the Send/Receive button on the Outlook toolbar. To fix this issue, Nortel recommends subscribers install Outlook 2002 SP 1 from Microsoft.

Accessing CallPilot support tools in Outlook 2002

This section describes how to use CallPilot support tools specific to Unified Messaging for Outlook 2002.

To reset the CallPilot Message Store in Outlook 2002

1. On the subscriber's computer, press the **Ctrl** and **Shift** keys.
2. In Outlook, on the **Tools** menu, click **Send/Receive**, **Accounts**, **CallPilot Desktop Messaging**.
3. Continue to press the **Ctrl** and **Shift** keys until the CallPilot Reset Mailbox dialog box appears.
4. Click **Reset Mailbox**.

To access the Outbox Fix utility in Outlook 2002

1. In Outlook, on the **Tools** menu click **E-mail accounts**.
   The E-mail Accounts wizard appears.
2. Select **View or change existing e-mail accounts**, and then click **Next**.
3. In the e-mail account list, select **CallPilot Unified Messaging**.
4. While you press the **Ctrl** and **Shift** keys, click **Change**.
   The CallPilot Outbox Fix dialog box appears.
5. Click **Fix outbox**.

Troubleshooting Lotus Notes logon problems

When Unified Messaging is installed, Unified Messaging appears under Folders and Views. In the Personal Name and Address Book on Local database, two new views are created:

- Groups (CallPilot)
- People (CallPilot)

Note: In Lotus Notes 5.0 these views are accessible only from the View menu. In Lotus Notes 5.0 subscribers must log on to CallPilot before they can download the address book.

In Lotus Notes 6.0 these views are accessible from the Contacts menu.

Subscribers cannot see CallPilot Unified Messaging

When the subscriber logs on, they do not see Unified Messaging.

1. Verify that the subscriber is in **Folders and Views**.
2. If they do not see Unified Messaging and they are in Folders and Views, ask the subscriber to uninstall the current version of CallPilot, and then reinstall it. When they reinstall, tell them to make sure that when they reach the Ready to Install window they select the Update Lotus Notes databases check box.

Note: Even if the subscriber does not select the check box, you can manually update the Mail database design.

Replace the Mail database design only if you have not customized Lotus Notes. If you replace the database design, any customization is removed.

You require Manager- or Designer-level access to update the Mail database design.

Replacing the Mail database design

The Lotus Notes administrator can replace the Mail database design from the Lotus Notes server.

To update the Mail database design

1. If you use Lotus Notes 5.0, copy the file cpmail50.ntf for Lotus Notes 5.0 into the notes/data directory on the Lotus Notes server.
   If you use Lotus Notes 6.0, run LNSERVER.EXE to copy the cpmail60nltf file.
2. Use **File > Database > Open** to add the mail database icon that you are going to update.
3. Select this icon.
4. Select **File > Database > Replace design**.
5. In the **Replace Database Design** window, select the **Show advanced templates** check box.

6 Make sure that:

- the **Inherit future design changes** check box is selected
- **Hide formulas and LotusScrip**t is not selected

7 Select **CallPilot Mail (R5.0)** or **(R6.0)**, depending on which version of Lotus Notes you use.

8 Click **Replace**.

9 Press **F9** to refresh the window and display the names.

No entries in CallPilot Personal Name and Address Book

While in the **Personal Name and Address Book** window, the subscriber selects **People (CallPilot)** and does not see any entries in the CallPilot Address Book.

Ask the subscriber to download the CallPilot Address Book manually and update the Personal Address Book template.

To manually download the CallPilot Address Book:

1 Make sure that Address Book—People (CallPilot) window is the active window.

2 On the **Actions** menu, select **Download CallPilot Address Book**.

The dynamic link library nNOTES.dll could not be found in the specified path

1 On your desktop, right-click the **Lotus Notes** icon, select **Properties**, and then click the **Shortcut** tab.

2 Examine the properties of your Lotus Notes shortcut.

3 Verify the path in the **Start in** box.
Note: Usually, when Lotus Notes creates a shortcut, it puts a working directory in this box.

4 Add or update the path.

You download the CallPilot address book and 0 entries are found

1 Check the **CallPilot Address Book** search base.
Search base is configured under **Actions > CallPilot Desktop Messaging > CallPilot Desktop Messaging**. Select the **Address Book** tab.

2 Verify that the search base is exactly as it is configured on the CallPilot Administration Client.

Troubleshooting after logging on

The CallPilot address book is empty

Lotus Notes subscribers must log on to CallPilot before they can download the address book.

1. Make sure that your **Address Book—People (CallPilot)** window is the active window.
2. On the **Actions** menu, click **Download CallPilot Address Book**.
3. On the **View** menu, click **Refresh**.
4. Make sure the CallPilot Address Book has been downloaded.

Outlook and GroupWise clients:

1. Click **Download CallPilot Address Book**.
2. If it responds with 0 entries found, verify that the search base is correct.

The subscriber has message access problems

The subscriber has modified the settings so that they are now correct, but the subscriber still cannot access messages.

If the subscriber modified the settings while Unified Messaging was open, close and reopen Unified Messaging so that the settings take effect.

The subscriber has problems sending messages

When the subscriber sends a message, it arrives in the recipient's Outlook mailbox, but it does not arrive in the CallPilot message mailbox.

1. Ensure that when you address the message, you locate the recipient's address in the CallPilot Address Book. If the recipient is defined in your Personal Address Book, then ensure that the Personal Address Book entry is a CallPilot address.
2. To ensure that the recipient is defined as a CallPilot Address type, highlight the name, click **Properties**, and verify that the Address Type=CallPilot.
3. Before you send the message, in the **To** field, highlight the Recipient, click **Properties**, and verify that the Address Type=CallPilot.

Messages remain in the subscriber's Outbox

On Microsoft Outlook, messages remain in the mail client outbox (not the CallPilot Message Store outbox). This problem can be caused by the migration of messages from one server to another while maintaining the same Outlook client.

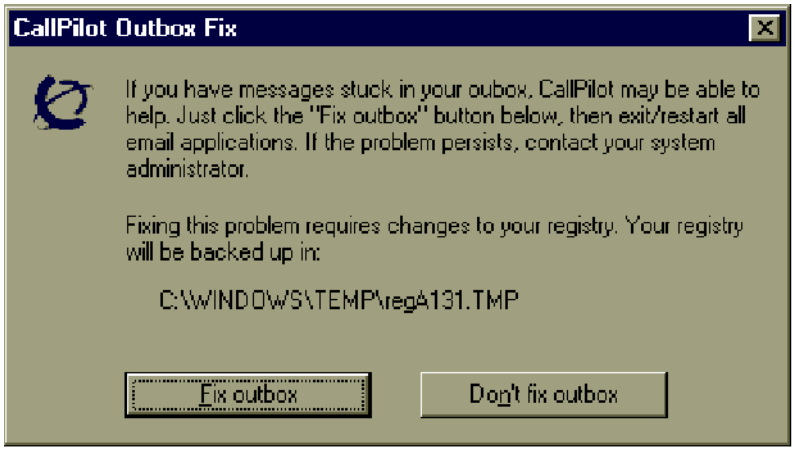
Remove the Exchange server, then re-add it to the subscriber's profile.

To fix the Outbox

1 On the subscriber's computer, on the **Tools** menu click **Services**.
The Services dialog box appears.

2 Select **CallPilot Desktop Messaging**.

3 Press the **Ctrl** + **Shift** keys, and click **Properties**.
The CallPilot Outbox Fix dialog box appears.


CallPilot Outbox Fix
If you have messages stuck in your oubox, CallPilot may be able to help. Just click the "Fix outbox" button below, then exit/restart all email applications. If the problem persists, contact your system administrator.
Fixing this problem requires changes to your registry. Your registry will be backed up in:
C:\WINDOWS\TEMP\regA131.TMP
Fix outbox
Don't fix outbox

4 Click the **Fix outbox** button.

The subscriber cannot send messages

The subscriber cannot send messages to fax, AMIS or digital networking subscribers.

1 Make sure that the subscriber is addressing the message correctly. Refer the subscriber to "Address Formats" in their online Help.

2 Ensure that the subscriber has the capability to send messages to fax, AMIS and digital networking subscribers. Security concerns can restrict subscribers from sending messages to these types of subscribers.

3 For fax addresses, ensure that you can dial the number the subscriber is specifying from the subscriber's phone set. Set-based restrictions can prevent the call from completing.

The subscriber cannot send a CallPilot message

The subscriber cannot send a CallPilot message. When the subscriber clicks **Send**, an error message appears that says, "Error. Failed to send message."

- Ask the subscriber to check that their mailbox is not full. If their mailbox is full, they cannot send messages until some messages are deleted.
- Ask the subscriber to check the format of the message address. If the FQDN after the at (@) symbol does not match the FQDN of the BCM configured to this mailbox, the message is rejected.

- Ask the subscriber to verify that no attachment is empty. An empty attachment causes the entire message to be rejected. Delete the empty attachment and try sending the message again.

Verify that you can ping the BCM:

1. At the DOS prompt, type:
   ping <Business Communications Manager FQDN>
2. If the response is "request timed out," then type:
   ping <Business Communications Manager IP address>

   Note: If there is a reply, then the BCM FQDN has not been properly configured to your Domain Name System (DNS). Contact your DNS administrator for assistance.
3. If there is no reply, verify that the BCM can be reached on your LAN. Contact your IS administrator for help.
4. Verify that the BCM is up and running.

Non-delivery notification

The subscriber receives non-delivery notifications for messages.

1. Ask the subscriber to verify that they have a valid attachment type.
2. Ask the subscriber to make sure that their mailbox is not full.
3. Ask the subscriber to make sure that they are addressing the message correctly. See "Address Formats" in the online Help.
4. Ask the subscriber to ensure that they are attaching only TIFF-F, VBK, WAV, or TXT files to their messages. Unified Messaging does not accept any other file types.
5. If the subscriber is sending to a remote location, ask the subscriber to verify that the address is valid and still exists.
6. For fax machines, ensure that the fax number is valid and the machine is accepting faxes.
7. Ensure that the subscriber has the capability to dial the number. Refer to the *CallPilot Manager Set Up and Operation Guide.*
8. Verify that the remote server is responding by issuing a network command on the BCM. Internet Mail clients cannot send or receive WAV files.

"Unknown" appears in the Sender field

In some messages, the subscriber sees a name or phone number in the Sender field. In other messages, the subscriber sees "Unknown."

If the caller's phone system has Calling Line ID, CLID information appears in the Sender field for messages that are created when people phone you and you are not available. If CLID information is not provided, it appears as "Unknown." For messages that are sent by people using Networking, if the sender's name is not provided to the CallPilot system, the Sender field appears as "Unknown."

The subscriber has problems with faxing

- If the error message states that the message cannot be sent because part of the media cannot be converted, or because the media is not supported at the recipient's system, ensure that the subscriber only sends attachments that are TIFF-F, WAV, VBK, or text files.
- Ensure that the subscriber and the recipients can send and receive fax (TIFF-F) messages. Also, ensure that all TIFF files are TIFF-F files created using the Nortel Fax Printer. Not all TIFF files are class F.
- Ask the subscriber to check that their mailbox is not full. If, when they log on to Unified Messaging or the telephone, they receive a message that their mailbox is full, they cannot send any messages until they delete some messages to create space in their mailbox.

The subscriber has problems with fax reception

People do not receive faxes sent by the subscriber, or the subscriber does not receive faxes sent to them.

- Verify that the subscriber has a mailbox Class of Service with fax capability.
- Make sure that the people the subscriber is sending faxes to can receive faxes. For more information, refer to the *Unified Messaging Quick Reference Guide*.

The subscriber has problems receiving replies

People receive the subscriber's CallPilot messages, but the subscriber does not receive their replies.

1. On the **Actions** menu, select **CallPilot Configuration**.
2. Click **Properties**.
3. Ensure that the SMTP/VPIM prefix is specified correctly.

Deleted messages remain in the subscriber's mailbox

When a subscriber deletes messages using Unified Messaging, the messages are still in the subscriber's mailbox when they access the mailbox using the telephone.

If the deleted messages are still in a Deleted Items folder in the CallPilot Message Store, the messages remain in the subscriber's CallPilot mailbox. To remove the messages from both mailboxes, the subscriber must permanently delete them from the Deleted Items folder.

The subscriber cannot delete messages

When the subscriber tries to delete the messages permanently, the messages remain.

Subscribers cannot delete messages using Unified Messaging while they are logged on to their mailbox from their telephone.

Ask the subscriber to end the telephone mailbox session and then try to delete the messages from Unified Messaging.

Messages no longer on server

The subscriber receives the error message: “This message could not be found on the server. Messages must exist on the server in order to be played via the telephone. Use computer to play this file. Port failed.”

Voice messages that are saved to the subscriber’s computer are no longer in the CallPilot Inbox. The subscriber cannot play these messages from the telephone. To listen to these messages, the subscriber must use computer speakers or headphones.

Voice message does not play on telephone

The subscriber tries to play a voice message from the telephone. The subscriber answers the telephone when it rings but the message does not play.

1. Ask the subscriber to say something like “hello,” to initiate message playback.
2. Ask the subscriber to check the CallPilot player Status bar. If it states Open Pending, the subscriber should hang up the telephone. Then click **Computer** on the player, and click telset playback. The phone rings again.
3. Tell the subscriber that if the Status bar still says Open Pending, hang up again, wait three to five minutes, then try to play the message again. If this problem persists, contact your Nortel Customer Technical Support.
4. The number of outcalling channels used by the CallPilot telset player is determined by the number of outcalling channels configured in CallPilot Manager. Ensure that this number is greater than zero and that the other channels are not currently in use. For information about configuring outcalling channels, refer to the *CallPilot Manager Set Up and Operation Guide.*

The Message Waiting Indicator is active but there is no new message

The subscriber's telephone Message Waiting Indicator is activated but there is no new message in the subscriber's Desktop Inbox. This discrepancy can occur because messages are downloaded from the BCM with the same frequency as e-mail messages (this applies only to Lotus Notes subscribers).

1. To adjust the frequency, on the **File** menu, select **Tools**.
2. Click **User Preferences** and click **Mail**.
3. Change the **Check for mail every __ minutes** setting.
4. If you want to check for mail immediately, on the **Actions** menu, select **Refresh CallPilot Message List**.

A reply to a message sent from Eudora is rejected on an AMIS network

A reply to a message cannot be sent over an AMIS network. The message is rejected because autotext is placed at the start of the message.

1. Open the **Eudora.ini** file using a text editor, such as Notepad.
2. Under the [Settings] statement, add these lines:
   ReplyAllAttribution=
   ReplyAttribution=
3. On the **File** menu, click **Save** to save the settings.

Unified Messaging does not work properly for subscribers who use ICQ Express with Outlook

Unified Messaging is incompatible with the ICQ Express add-on for Microsoft Outlook. Advise the subscriber to remove the ICQ Express add-on. Removing this add-on does not affect the operability of ICQ, it only removes the ICQ content from Outlook.

To remove the ICQ Express add-on:

1. Start Microsoft Outlook.
2. On the **Tools** menu, select **Options**.
3. Click the **Other** tab and select **Advanced Options**.
4. Click the **COM Add-Ins** button.
5. Select **ICQ Express** and click the **Remove** button.
   Unified Messaging and ICQ will now both operate as expected.

In sent messages, digits or symbols appear instead of language-specific symbols

The only character sets that are supported are us-ascii and ISO-8859-1. The messaging client must be configured to use ISO-8859-1 character encoding, usually displayed as the option Western (ISO-8859-1) or Western European ISO in most e-mail applications. This does not restrict users in other countries from using text messaging; it only limits which character sets can be used to compose and send these messages.

Internet Mail client error messages

Unified Messaging Internet Mail clients display error codes when a problem occurs. Table 1 describes Unified Messaging error codes.

Table 1 Internet Mail client error messages

Code	Error message
6	Your message did not reach some or all of the intended recipients.
16	The message was not delivered because an undefined problem occurred.
17	There is a problem with the specified address. Please verify the address.
18	The external telephone number used in addressing the message could not be dialed. Please verify the telephone number.
19	The mailbox or telephone number is invalid. Please confirm the address.
20	The address is invalid. Please verify the destination system.
22	The mailbox address was at one time valid, but mail is no longer being accepted. Please confirm the address.
23	The mailbox exists, but something at the destination mailbox caused your message not to be received. Please try sending the message again later.
24	The recipient did not receive the message because the recipient did not instruct the service to play the message (by pressing the appropriate telephone key).
25	The mailbox exists, but is not accepting messages at this time because it may be temporarily disabled. Please try sending this message again later.
26	The recipient's mailbox is full. Please try sending this message again later.
27	The message length exceeds the administrative limit for the sender's mailbox.
28	The address is a mailing list and could not be expanded.
29	The message was not delivered because a system problem occurred.
30	The system storage has been exceeded. Please try sending this message again later.
31	The recipient's system is not accepting messages. Please try sending this message again later.
32	Some features in the message are not supported. For example, you may not be able to send a message with this media.

Code	Error message
33	Recipients are not able to receive messages with a private tag. Please try sending the message again without the private tag.
35	The system does not allow messages that are this large. (NOTE: The maximum message length is 30 minutes.)
36	A problem occurred in the network. Please try sending the message again later.
37	An outgoing connection could not be made with the destination. Please try sending the message later.
38	A problem occurred during the transmission of your message.
39	A directory server was unavailable. Please try again later or contact your Administrator.
40	The network was congested or the telephone line was busy. Please try sending the message later.
41	The number of attempts to deliver the message has exceeded the system maximum. Please try sending the message again later.
42	An error occurred during the transmission of your message.
43	This message was addressed to too many recipients. Please reduce the number of recipients and try sending the message again.
44	There was a problem with the content of your message. Please re-create the message and send it again.
45	The message contains media which cannot be delivered. The recipient may not be able to receive a message with this media.
46	The voice portion of the mixed media message was delivered. The recipient can only receive this part of the message.
47	The fax portion of the mixed media message was delivered. The recipient can only receive this part of the message.
48	Some media contained in your message was not converted successfully. Some of the recipients did not receive the message.
49	A security measure or policy prevented the delivery of the message. Please contact your administrator.
50	The recipient(s) could not be reached. Please consult with your administrator for assistance.
51	Legislative policy restricts the delivery of messages at this time. Consult with your administrator on the best time to send the message.
52	The recipient(s) could not be reached. Please consult with your administrator for assistance.
92	Invalid mailbox number/password.
94	User does not have desktop capability. Please contact your administrator.
95	95 Invalid mailbox number/password. Please contact your administrator.
97	Invalid mailbox number/password. Maximum number of invalid login attempts occurred. Please contact your administrator.

Code	Error message
98	Invalid mailbox number/password. Maximum number of invalid login attempts in this session occurred. Please restart your login session.
100	Invalid login. Cannot access system resources. Try again later.
101	Too many login failures.
102	Too many authentication failures.
105	Autologout; your session has been idle for too long. You are no longer connected to the server. Please log in again to send and receive new messages.
107	Mailbox error.
108	Your mailbox is almost full.
110	Your password has expired. Please change your password.
111	The temporary password assigned to you by the administrator must be changed. Please change your password.
123	The 'Login' authentication method is disabled. Please contact your administrator.
124	The 'Challenge-Response' authentication method is disabled. Please contact your administrator.
125	Your mailbox is full. Delete messages you no longer require.
133	Remote Notification was turned off by the person who answered the notification call. It has now been turned back on.
134	Remote Notification was turned off. It has now been turned back on.
135	Remote Notification has been turned off. Please ensure that the number is correct, and review your notification setup before turning notification back on.
136	Your password will expire in ***n*** day(s) [where ***n*** is the number of days]

Replacing the mail database in Lotus Notes

Replace the Lotus Notes mail database only if:

- a subscriber wants CallPilot messages to be stored in the same Inbox as their Lotus Notes e-mail messages
- the subscriber's database design has not been customized, and the subscriber does not intend to customize the database design in the future
- you are familiar with modifying the Lotus Notes database design

Caution: Risk of data loss

Replacing the database design removes any customization in the current database design. If the mail database is customized, update the database instead of replacing it.

You can replace the mail database from the subscriber's workstation or from the Notes server.

To replace the database design from the user's computer

1. Log on to Lotus Notes on the subscriber's workstation.
2. Make a note of the version of Lotus Notes. Choose **Help > About Notes Desktop**.
3. Select the mail database icon.
4. Choose **File > Database > Replace Design**.
   The Replace Database Design dialog box appears.
5. Click **Template Server**.
   The Template Server dialog box appears.
6. Select **Local**, and then click **OK**.
7. Check the **Show advanced templates** box.
8. From the list, select **CallPilot Mail (R5.0)** or **(6.0)**, depending on the version of Lotus Notes.
9. Make sure that:
   - **Inherit future design changes** is selected
   - **Hide formulas and LotusScript** is NOT selected
10. Click **Replace**.
    A message appears that asks you to confirm that you want to change the database's view.
11. Click **Yes**.

To replace the database design (Notes server)

1. Install Unified Messaging on the Lotus Notes server computer.
2. Start Lotus Notes.
3. Choose **File > Database > Open**.

4 Select the mail database icon.

5 Choose **File > Database > Replace design**.
The Replace Database Design dialog box appears.

6 Select the **Show advanced templates** check box.

7 Select CallPilot Mail (R4.5), CallPilot Mail (R4.6), or CallPilot Mail (R5.0), as required.

8 Make sure that:

- **Inherit future design changes** is selected
- **Hide formulas and LotusScript** is NOT selected

9 Click **Replace**.
Repeat steps 3 through 9 for each database that you must update.

10 Press **F9** to refresh the window and display the names.

Accessing Unified Messaging online Help

Unified Messaging for Microsoft Outlook, Novell GroupWise, and Lotus Notes provides standard Help.

Note: To access Internet Mail client Help, on the Messaging Administration menu click **Internet Mail Client Administration**.

Internet Mail client Help contains Help for the CallPilot interface. Use the manufacturer's online Help for questions about your Internet Mail client.

To access online Help

From Microsoft Outlook:

- From your **Inbox**, on the **Help** menu, select **CallPilot Desktop Messaging Help**.

From Novell GroupWise:

- From your **Inbox**, on the **Help** menu, select **CallPilot Desktop Messaging Help**.

From Lotus Notes:

- From your **Inbox**, on the **Actions** menu, select **CallPilot Help Topics**.

Using Unified Messaging Support Tools

Resetting the CallPilot message store for Microsoft Outlook

This feature is available only for subscribers who use Microsoft Outlook. Resetting the CallPilot message store removes invalid or corrupt messages from the inbox.

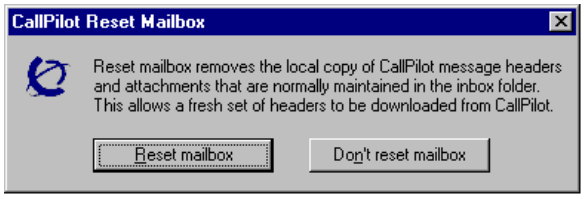
Lotus Notes and GroupWise clients can reset their mailboxes by choosing the **Refresh CallPilot Message List** option.

To reset CallPilot message store for Microsoft Outlook 2000

1 Press **Ctrl + Shift**.

2 On the **Tools** menu, click **Send and Receive**, and then click **CallPilot Transport**.

3 Press **Ctrl + Shift** until the **CallPilot Reset Mailbox** dialog box appears.


CallPilot Reset Mailbox
Reset mailbox removes the local copy of CallPilot message headers and attachments that are normally maintained in the inbox folder. This allows a fresh set of headers to be downloaded from CallPilot.
Reset mailbox
Don't reset mailbox

4 Select the **Reset Mailbox** button.

All CallPilot messages are purged from the subscriber's mailbox, and the CallPilot message headers that are stored for the subscriber are downloaded again. The messages disappear and then reappear one by one. All message caching is lost.

Note: The messages are not deleted from CallPilot. The messages are removed from the client computer cache. The messages are downloaded again from BCM to the client computer.

This feature is intended for system administrators and CallPilot product support.

CPTrace

You can use CPTrace to collect information about problems with any of the desktop clients that run CallPilot. You save this information to a log file that you can analyze to determine the cause of the problem.

Problems you can look for include:

- trouble connecting to the Business Communications Manager system
- CallPilot player problems
- address book problems
- problems with message compose, reply, forward, delete and notification

To use CPTrace, you must understand Unified Messaging functionality and the corresponding components on the IMAP server.

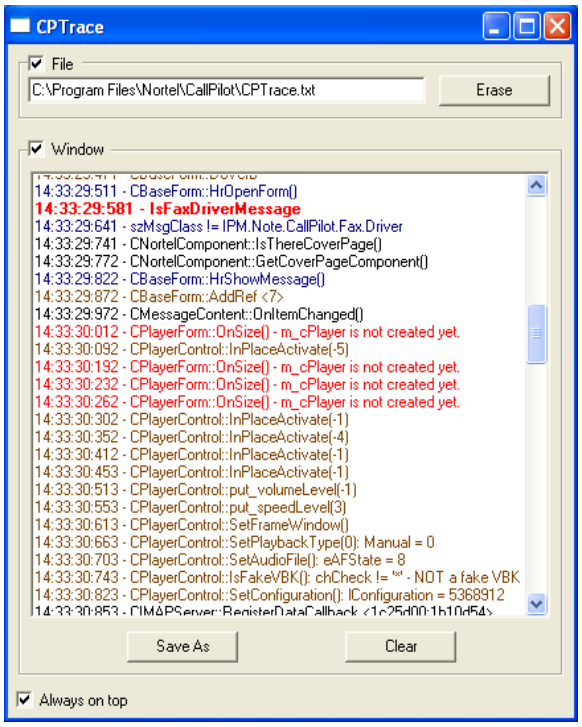
Note: Running CPTrace affects how CallPilot works. It is possible that you will not be able to reproduce problems while CPTrace is running.

CPTrace.exe is installed with each desktop client in the \Program Files\Nortel\<client directory>:

- for Microsoft Outlook, in nmdc
- for Lotus Notes, in nmin
- for GroupWise, in nmgw

Using CPTrace

To use CPTrace, double-click the CPTrace.exe in the corresponding desktop client directory.


CPTrace
File
C:\Program Files\Nortel\CallPilot\CPTrace.txt
Erase
Window
14:33:29:511 - CBaseForm::HrOpenForm()
14:33:29:581 - IsFaxDriverMessage
14:33:29:641 - szMsgClass != IPM.Note.CallPilot.Fax.Driver
14:33:29:741 - CNortelComponent::IsThereCoverPage()
14:33:29:772 - CNortelComponent::GetCoverPageComponent()
14:33:29:822 - CBaseForm::HrShowMessage()
14:33:29:872 - CBaseForm::AddRef <7>
14:33:29:972 - CMessageContent::OnItemChanged()
14:33:30:012 - CPlayerForm::OnSize() - m_cPlayer is not created yet.
14:33:30:092 - CPlayerControl::InPlaceActivate(-5)
14:33:30:192 - CPlayerForm::OnSize() - m_cPlayer is not created yet.
14:33:30:232 - CPlayerForm::OnSize() - m_cPlayer is not created yet.
14:33:30:262 - CPlayerForm::OnSize() - m_cPlayer is not created yet.
14:33:30:302 - CPlayerControl::InPlaceActivate(-1)
14:33:30:352 - CPlayerControl::InPlaceActivate(-4)
14:33:30:412 - CPlayerControl::InPlaceActivate(-1)
14:33:30:453 - CPlayerControl::InPlaceActivate(-1)
14:33:30:513 - CPlayerControl::put_volumeLevel(-1)
14:33:30:553 - CPlayerControl::put_speedLevel(3)
14:33:30:613 - CPlayerControl::SetFrameWindow()
14:33:30:663 - CPlayerControl::SetPlaybackType(0): Manual = 0
14:33:30:703 - CPlayerControl::SetAudioFile(): eAFState = 8
14:33:30:743 - CPlayerControl::IsFakeVBK(): chCheck != '' - NOT a fake VBK
14:33:30:823 - CPlayerControl::SetConfiguration(): IConfiguration = 5368912
Save As
Clear
Always on top

CPTrace settings

The CPTrace settings are stored in the Windows registry. The existing settings are used each time you run CPTrace.

Table 2 CPTrace Settings

CPTrace Settings	Descriptions
IMAP/SMTP	Logs all IMAP/SMTP traffic
Desktop client	Logs internal Outlook, Lotus Notes and GroupWise traffic
Audio Player	Logs Audio player traffic
File	File writes logs to a file. Check this box and type a file name and extension to maintain the log. You can include a directory path such as c:\my player. When you close CPTrace with the File check box selected, the Desktop client continues to write information to the file selected. This slows down the Desktop operation slightly. The log file never gets larger than 1MB. When the file size reaches 1MB, 10 percent of the file is purged, starting with the oldest data. If you select the File check box and close CPTrace, you receive a warning that File tracing is still enabled and you are asked whether you want to leave file tracing on. Click Yes to leave file tracing enabled.
Window	Window writes logs to the display window.
Erase	Erase deletes the log file from the directory you defined for it. A message appears that asks you to confirm the deletion.
Clear	Clears the display window
Save	A Save As dialog box appears that you can use to save the trace to a text file. The default file name is CPTrace.txt. This file is stored in a temporary directory.
Always on top	Check this box to keep the CPTrace tool on top of other windows.

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